CA2ALTS
90A77
c.v

c.1 T00612

JUL 30 '91
ALBERTA TOURISM LIBRARY

ASSESSMENT OF THE TEXAS VACATION MARKET FOR TRAVEL TO ALBERTA

LEGISLATURE LIBRARY
AUG - 4 1992
EDMONTON

November, 1990

Prepared For:

ALBERTA TOURISM

Prepared By:

DAVIDSON-PETERSON ASSOCIATES, INC.
18 Brickyard Court/ P.O. Box 350
York, Maine 03909

#223-02-90

Alberta
TOURISM

CityCentre, 10155 - 102 Street, Edmonton, Alberta, Canada T5J 4L6

To Whom it may Concern:

The following consultant's study was undertaken by an independent consultant commissioned by Alberta Tourism. The purpose of the study was to provide information about the potential tourism market in Texas. This study was completed in November 1990.

One page has been removed from this report. This page (48) contained confidential information for the use of Alberta Tourism.

92-07174/

TABLE OF CONTENTS

	Page
INTRODUCTION	i
HIGHLIGHTS OF THE FINDING: MANAGEMENT SUMMARY	xx
THE FINDINGS IN DETAIL	
I. Background Information and Texas Trends	1
II. Current Vacation Patterns Among Texans	22
III. Alberta As Texans Know It	45
IV. How Can The Texas Market Be Reached?	58

APPENDIX:

References Cited
Balancing Plan
Sample Disposition
Questionnaire

INTRODUCTION

INTRODUCTION

A. Background and Intent

Alberta Tourism is interested in achieving a higher level of visitation from the Texas market. With the restoration of direct air service from Dallas and Houston to Calgary and Edmonton, Alberta Tourism wishes to learn how to develop tourism to the Province from the state of Texas.

Alberta Tourism commissioned Davidson-Peterson Associates, Inc. to conduct a market potential study for Texas. The goal of the study is to provide a strong resource of information concerning the Texas vacation travel market in order to guide Alberta's marketing strategies designed to increase Texas residents' visitation to the Province.

This report presents our findings from this program of research.

B. *Research Objectives*

The overall objective of this research and consulting effort has been to provide a resource of information on the Texas vacation travel market to guide marketing strategies designed to increase travel to Alberta. Within that goal, we have addressed the following objectives:

- . . . To assess the size and characteristics of the Texas travel market overall and in the key market segments;
- . . . To assess the types and frequency of Texans' vacations;
- . . . To identify the kinds of vacation experiences Texans desire -- emphasizing those which Alberta can provide;
- . . . To profile both past and likely future Alberta vacationers from Texas and determine the interest among Texans in taking a vacation in Alberta;
- . . . To examine the sources of travel information and media utilization of Texans; and
- . . . To assess economic, demographic and social trends in Texas which may enhance or detract from the flow of visitor traffic to Alberta.

Overall, our goal is to provide a reliable, projectable assessment of the Texas vacation market and to examine the potential for increasing visitation to Alberta within the current and projected economic climate in Texas. The questions, "Who might be intrigued to visit Alberta? What type of vacation experience would they be interested in? and, How can they be reached?" have been key in our analysis.

C. *What Was Done*

1. Data Collection

To achieve our objectives, we completed primary and secondary research, including conducting telephone interviews with 2,774 Texas residents, and collecting secondary data from a variety of sources, including the Texas Comptroller of Public Accounts, the Texas Department of Commerce/Texas State Data Center, Texas A & M University and the State Department of Highways and Public Transportation-Travel and Information Division.

A total of at least four hundred sixty interviews were completed in each of six regions of Texas -- (1) West Texas, (2) North Texas, (3) Southeast Texas, (4) Dallas-Ft. Worth, (5) Austin-San Antonio, and (6) Houston (see map on page v). Within these regions, four demographic segments, were included:

- Adults under 45 years of age, have no children under 18 and a total annual household income of more than $25,000.
- Adults with children under 18 years of age at home and a total annual household income of more than $25,000.
- Adults 45 years of age or older, have no children under 18 at home and a total annual household income of more than $25,000.
- Adults with a total annual household income of $25,000 or less (excluding those who are students or retired).

1
2
3
4
5
5
6

A minimum of three hundred eighty interviews per region were conducted with Texans who qualified for the first three groups -- our key market segments. Respondents were asked questions concerning their vacation patterns and vacation planning, informational needs, media utilized, and past or planned Alberta trips as well as demographic characteristics.

A minimum of eighty interviews per region were completed with those Texans who qualified for the fourth group. These respondents were asked questions only with regard to vacation patterns and demographics, since it has been assumed that having a total household income of less than $25,000, there would be less available disposable income to spend on travel.

A random sample of telephone numbers was obtained for each region from Scientific Telephone Samples in Tustin, California. Questionnaires were pre-tested during the week of September 10, 1990. Interviewing began on September 13, 1990 and was completed October 9, 1990. A table of the sample disposition, including the number of completed interviews, terminates, and refusals is included in the appendix to this report.

A copy of the questionnaire used may be found in the Appendix to this report. Detailed tabulations have been forwarded under separate cover.

The number of completed interviews for each demographic group and region is as follows:

Number of Completed Interviews

Market Segments	TOTAL	Regions					
		West Texas	North Texas	S.E. Texas	Dallas/ Ft Worth	Austin/ San Antonio	Houston
		#	#	#	#	#	#
TOTAL for Key Segments	2774	461	466	462	460	463	462
Young singles/ Couples	703	116	95	97	114	146	135
Families	847	136	143	148	142	137	141
Empty Nesters	739	129	148	135	124	97	106
Income of $25,000 or less, not students or retired	485	80	80	82	80	83	80

2. Sample Balancing

The data were balanced to represent the distribution of Texas households in the 1985 estimates based on the 1980 United States Census.

The balancing was accomplished by applying a weight to each cell in a region by demographic group matrix. The sample was weighted by the percent of households in each region, so that the 461 interviews, or 16.6% of the sample collected in the West Texas region would in the weighted sample account for only 11.7%. Similiarly, the 460 interviews (16.6% of the sample) from the Dallas/Fort Worth region were weighted so as to represent 22.9% of the households in the State.

Weights for the different demographic groups within each region were developed from the percent that each group comprised of the sample. This was accomplished by adding the number of completed interviews and the number of interviews terminated because the quota for that group was already full and determining the percent of each region's sample these sums represented. The cells were then balanced to this percent. See the appendix for a complete list of all weights.

Region	1985 Households		Interviews		Balanced Sample	
	#	%	#	%	#	%
1 West	677,200	11.7	461	16.6	467	11.7
2 North	622,400	10.7	466	16.8	430	10.7
3 Southeast	1,120,600	19.3	462	16.7	773	19.3
4 Dallas/Ft. Worth	1,328,900	22.9	460	16.6	917	22.9
5 Austin/San Antonio	639,500	11.0	463	16.7	441	11.0
6 Houston region	1,406,600	24.3	462	16.7	971	24.3
TOTAL	5,795,200	99.9*	2774	100.1*	3999	99.9*

* Totals do not equal 100% due to rounding

3. Sample Characteristics

Three of the four demographic groups described on page iv comprise the key target markets of interest. The first group is referred to as "young couples or singles" (under 45 years old, no children under 18), the second group as "families" (all age groups with children under 18) and the third group as "empty nesters" (45 years or older, no children under 18).

The fourth group, those households whose total income is $25,000 or less (except for students and retired persons), is not considered key to the analysis because it is assumed that these people have less disposable income available and therefore would be less likely to travel.

The three key market segments comprise 69% of the total population of Texas or approximately 4.02 million households. The other households making $25,000 or less make up 31% of the Texas market and are excluded from further analysis.

- . . . The young singles or couples market totals 18% of all Texans or approximately 1.06 million households.
- . . . Families comprise 30% or 1.76 million Texas households.
- . . . The empty nester market represents 21% or 1.20 million Texas households.

	Balanced Sample		Texas Households
	#	%	#
TOTAL	4000 *	100.0	5,795,200
$25,000 or less	1226	30.7	1,779,126
Total Key Market Segments	2774	69.4	4,021,867
Young singles/couples	731	18.3	1,060,521
Families	1212	30.3	1,755,945
Empty nesters	832	20.8	1,205,401

* Totals may not add exactly due to rounding.

The student and retired markets, no matter what their total household income, are included in the key market segments for which they qualify. It is expected that these two groups are likely to travel despite the lower income because they have more available time.

The distribution of these qualifying as students/retired by market segment is:

Distribution of Student and Retired Respondents

	Key Market Segments		
	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(731)	(1212)	(832)
	%	%	%
Students	21	8	1
Retired	1	2	44

In demographic characteristics, the three market segments, are quite similar except for the obvious differences resulting from the way the segments were defined. For example, by definition, young singles and couples had to be less than 45 years old, have no children under 18, and the families market segment was the only group which had children 18 years old or younger. However, it is worth noting a few interesting points.

In general, the young singles and couples are more likely to be college educated, white collar and live in a city rather than in the rural regions. Nearly half of the young singles or couples had a college degree or post graduate (49%). The Southeast region has the lowest percent of young singles/couples (15%). Dallas/Fort Worth and Houston had the highest percent (27%).

The families market segment tend to be in the middle income bracket, with more blue collar occupations than the other market segments. More families have chief wage earners with blue collar occupations (36%) and have household incomes of between $40,000 and $60,000. North Texas (11%), West Texas (12%), and Austin (12%) have the smallest percent of the family market segment and Houston has the highest percent (25%).

Empty nesters tend to be at either the high end or the low end of the income scale; fewer fall in the middle income bracket. A larger percentage of empty nesters are retired (34%), are not blue collar (21%) and are Caucasian (87%). This group has the smallest percent of Hispanics (4%). Dallas/Fort Worth, the region with the second highest population, has the largest percent of empty nesters (26%).

Empty nesters fall into two different income brackets. Compared with the other groups, a larger percentage of empty nesters fall into the lowest income bracket of $25,000 or less (20%). As well as, the highest income bracket of more than $60,000 (20%).

The small percentages of children under 18 years old found in the young singles/couples and empty nester market segments are due to mixed households and extended families.

Since the question that determined which market segment each respondent fit into asked "Do you have any children under 18 years of age living at home?" and the questions which determined the age categories of any children ask about the entire household, a discrepency developed with mixed families. The children in the young singles/couples market segment are either children of another couple, where two couples are living together or younger sibling where a single over 18 is living with his/her parents. Where children appear in the empty nester market segment, it is also due to blended families, often with several generations in a household.

Classification Data For Market Segments

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Occupation of chief wage earner				
White collar	62	65	61	62
Blue collar	29	27	[36]	21
Other/retired	11	1	1	[34] **
Education of chief wage earner				
Highschool or less	30	[20]	32	35
Some college	27	31	27	24
College graduate	42	[49]	40	40
Household income (average)	$42,700	$40,000	$43,900	$43,500
$25,000 and less*	12	13	[5]	[20]
$25,001 - $40,000	40	44	45	[28]
$40,001 - $60,000	24	22	[29]	20
$60,001 and more	16	14	16	[20]
Refused	8	7	5	12
Socioeconomic Status				
Low Score	24	21	24	28
Score 3	10	5	10	[15]
Score 4	14	16	14	13
Medium Score	44	46	46	[40]
Score 5	14	13	15	14
Score 6	14	14	15	13
Score 7	16	19	16	13
High Score	23	24	24	[19]
Score 8	15	17	17	[10]
Score 9	8	7	7	9

* Students and retired only.

** Does not total to 100% because "retired" respondents provided their former occupations as well.

Classification Data For Market Segments (cont.)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Household size (average)	2.3	1.5	[3.1]	1.3
Children under 6	22	2	[49]	*
Children 6 - 12	22	1	[48]	1
Teenagers (13 - 17)	18	1	[39]	1
Average age	41.5	30.1	35.9	59.8
Ethnic Background				
Caucasian/white	80	79	77	[87]
Hispanic	10	10	13	[4]
Black	7	6	7	6
Other	3	4	2	4
Gender				
Male	43	[54]	40	38
Female	57	[46]	60	62
Region				
West Texas	12	11	12	12
North Texas	11	[8]	11	13
Southeast Texas	19	[15]	21	20
Dallas/Ft Worth	24	27	[20]	26
Austin/San Antonio	11	12	12	9
Houston	24	27	25	21

See note on following page for explanation of symbols used in this table.

D. A Note On The Text Tables

A confidence level of 95% was used in computing the standard t-test to determine significant differences between analytic groups.

Percentages for characteristics or dimensions on which an analytic group differs significantly from its counterparts at this level have been indicated with brackets -- e.g. thirty six.

. . . For three-way analyses (key market segments, i.e.)

- Brackets on all three numbers indicate each is significantly different from each of the other two:
  [5] [10] [20];

- Brackets on one of the three indicates that that number is different from the other two (which are not different from each other):
  [10] 20 20;

. . . For two-way analysis (would consider/would not; i.e.), brackets are placed on the larger of the two numbers to indicate a significant difference:
10 [20];

Note that percents in text tables may not total 100% due to rounding of percentages base on weighted data.

An asterisk (*) is used in tables to denote that the percent is less than 0.5%.

As noted the key market segments include households with total income of over $25,000 and students and retired people, regardless of household income who qualify in each of the three groups.

A MANAGEMENT SUMMARY

HIGHLIGHTS OF THE FINDINGS: MANAGEMENT SUMMARY

Alberta Tourism is interested in achieving a higher level of tourism from the Texas market and in learning how to develop tourism to the Province of Alberta from the state of Texas. Davidson-Peterson Associates, Inc. conducted a market potential study for Texas. The goal was to provide a strong resource of information concerning the Texas vacation market in order to guide Alberta's marketing strategies.

To provide this assessment of the Texas vacation market and develop the type of information necessary to suggest strategies for increasing visitation to Alberta from Texas, we conducted both primary and secondary research. Our research included conducting telephone interviews with 2,774 Texas residents and gathering secondary data from a variety of sources.

From September 13 to October 9, 1990, a minimum of four hundred sixty interviews were completed in each of six regions of Texas -- (1) West Texas, (2) North Texas, (3) Southeast Texas, (4) Dallas-Ft. Worth, (5) Austin-San Antonio, and (6) Houston.

Within these regions, three demographic groups were identified as key market segments: young singles/couples, families, and empty nesters with annual household incomes of $25,000 or more or with lower incomes and the chief wage earner retired or in school.

The three key market segments comprise 69% of the total population of Texas or approximately 4.02 million households. Those households making $25,000 or less that are not students or retired make up 31% of the total Texas market and are excluded from our analysis, on the assumption that they will be less likely to travel with less disposable income.

Our findings from this study to assess the Texas travel market may be summarized as follows:

<u>The Texas Market for Alberta</u>

. . . Secondary research findings suggest that Texas represents a large potential market, due to its population growth and success in diversifying its economy and recovering from its recent recession.

However, a few obstacles may limit tourism to Alberta from Texas --including, amount of service, competition from U.S. states closer to Texas which offer similar vacation opportunities and strong marketing programs of nearby states, seeking to attract Texans.

... Texans in the key market segments do travel both long distances and for long periods of time. Colorado, California and Florida are important U.S. destinations for those who travel outside of Texas. Anywhere in Canada was the destination for a primary vacation for only 2% of Texans in the key markets.

... Most Texans are aware of Alberta --or a place in Alberta -- as a vacation destination. Only a minority, however, have ever visited the Province. Most who have visited have done so since 1980, usually on touring or outdoors vacations.

... Though at present, very few Texans are considering or planning a vacation to Alberta, those who would consider such a trip represent a reasonable sized group within the Texas market. These considerers are most likely to live in the major metropolitan areas of Dallas/Fort Worth and Houston as well as the southeastern Texas area. Marketing communications should likely be concentrated in these areas.

Travel Planning

... The majority of Texans in the key market segments begin their vacations in the summer.

... Texans have a relatively short planning horizon for making travel planning decisions. Most make their final decision about where to go during the three months prior to leaving. In addition, most begin to think about where to go only in these same three months. Communications designed to deliver planning information to prospects will be most effective in the late spring and early summer.

... Half of all Texans use travel organizations of some sort to gather information. Travel agents are most often the source. Many use various types of literature, primarily from government tourism departments.

A Key Target Market

... Empty nesters appear to be the strongest target market in Texas for a variety of reasons.

- Empty nesters tend to be affluent and have more time available to travel. A larger percentage have incomes of more than $60,000, and almost half are retired.

- Almost half of the empty nesters live in either Dallas/Fort Worth or Houston.

  Since these are the only two Texas cities with direct air connections with Edmonton and Calgary, access to Alberta is considerably easier there.

- Empty nesters take longer vacations with more nights outside Texas.

- On vacation, many empty nesters look for natural beauty, mountain scenery and a sense of history -- all of which can be found in Alberta.

... Empty nesters can be more easily reached via print media, since they are more likely to read magazines and read them more thoroughly than the other market segments.

- Reader's Digest, National Geographic and Modern Maturity are popular media with the empty nesters.

- Two newspapers -- Dallas Morning News and Houston Chronicle-Post -- will also reach empty nesters.

Conclusions

In sum, it is our judgment that marketing strategies for Alberta Tourism designed to attract Texans to Alberta should consider:

... Targeting empty nesters -- the group most likely to travel to Alberta;.

... Concentrating marketing efforts in the Dallas/Fort Worth and Houston metropolitan areas;

... Concentrating "planning" communications in the spring and early summer months when the majority of Texans are planning where to go on vacation;

... Selling Alberta as a touring destination -- with natural beauty, mountain, scenery, a sense of history.

... Utilizing magazines and newspapers for communications; and

... Enlisting the aid of travel agents in the process.

Detailed findings follow.

RGS IN DETAI

I. BACKGROUND INFORMATION AND TEXAS TRENDS

The following chapter reviews the economic climate in Texas as well as overall travel patterns of Texans. In so doing, we'll look at:

... Population trends;

... Trends in business;

... Travel trends; and

... Air service from Texas to Alberta.

Let's begin with a look at the Texas population.

A. Population Trends

Texas comprises 6.8% of the United States population and ranks third among the fifteen most populous states in the United States. Projections by the Bureau of the Census indicate that among the fifteen most populous states, Texas will rank second in population growth from 1980 - 1990, and fourth in population growth from 1990 - 2000.

Population: Largest 15 States
(ranked by 1988 population)

	(1) Population (thousands) 1980	1988	(1) Change in State Pop. 1980-1988 (%)	(2) Census Projections of Pop. Growth 1980-1990 (%)	1990-2000 (%)
California	23,668	28,314	19.6	23.1	15.0
New York	17,558	17,909	2.0	1.2	1.2
Texas	14,229	16,841	18.4	24.5	14.11
Florida	9,746	12,335	26.6	31.5	20.3
Pennsylvania	11,864	12,001	1.2	-0.3	-2.7
Illinois	11,427	11,614	1.6	1.6	-0.3
Ohio	10,798	10,855	0.5	-0.1	-1.5
Michigan	9,262	9,240	-0.2	0.3	-0.5
New Jersey	7,365	7,721	4.8	7.3	8.2
North Carolina	5,882	6,489	10.3	13.7	11.8
Georgia	5,463	6,342	16.1	22.0	19.4
Virginia	5,347	6,015	12.5	15.2	11.7
Massachusetts	5,737	5,889	2.7	2.5	3.5
Indiana	5,490	5,556	1.2	1.1	-0.9
Missouri	4,917	5,141	4.6	5.6	3.7

Sources:

(1) U.S. Dept. of Commerce, Bureau of the Census, State Population and Household Estimates, with Age, Sex, and Components of Change: 1981-88.

(2) U.S. Dept. of Commerce, Bureau of the Census, Current Population Reports. Projections of the States, by Age and Sex, 1988-2010, P-25, no. 1017, October, 1988.

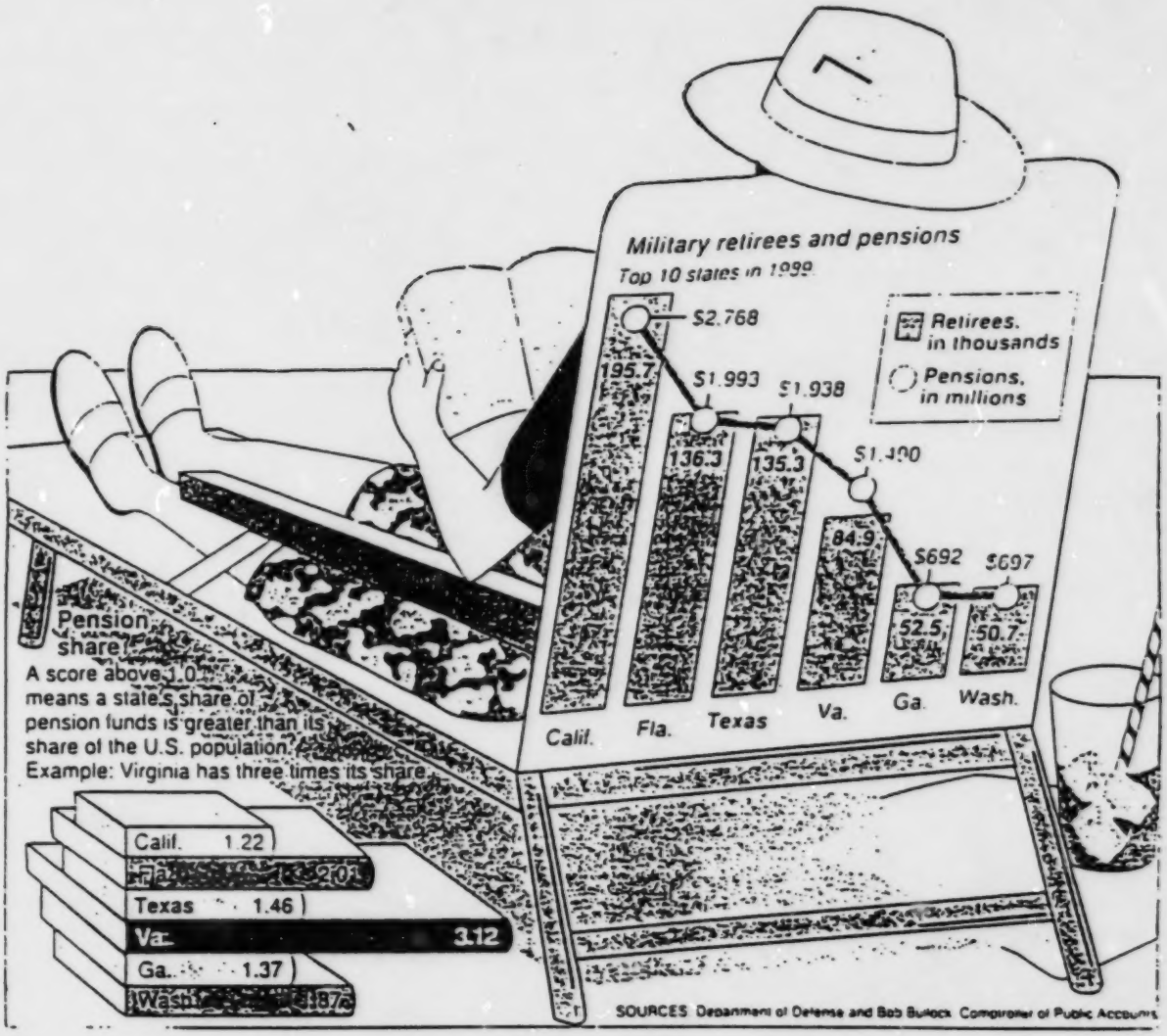
Age patterns of the Texas population reflect a slightly younger population than that of the total US population. One third of the Texas population is between the ages of 25-44, and just less than 20% are between 45 and 64 years of age.

Texas Population as Compared to the US Population
By Age

	Texas	United States
	%	%
Total	100	100 *
Younger than 18	30	26
18 - 24	11	11
25 - 44	33	32
45 - 64	17	19
65 and older	10	12

* May not total to 100% due to rounding.
Source: Statistical Abstract of the US, 1990, US Bureau of the Census.

Although only 10% of Texans are 65 and older, Texas has the third largest number of the nation's military retirees, and, subsequently, the third highest pension total.



Texas colleges and universities are recording increases in enrollment. In fact, Texas has the third highest full-time enrollment among the 15 most populous states. Reasons for Texas' growing enrollment may include:

. . . A continued rise in the number of college-age students in Texas; and

. . . The comparatively low tuition charged at Texas state schools.

Most Texans no longer earn their livelihood from the land, and now work in cities. Texas has thus become a very heavily urbanized state. The Texas population may well continue to grow in the cities since most Texas metropolitan areas have lower costs of living than the other 15 most populous states' metro areas. Furthermore, Texas has the second lowest typical residential electric bill among the 15 most populous states. This may mean that Texans who live in metro areas have more money to spend on products and experiences than those in other areas with higher energy costs.

Cost of Living Index +

Metropolitan Area	Composite Index* 3rd Quarter 1989	Composite Index* 2nd Quarter 1989
TEXAS		
Austin	94.6	95.6
Dallas	103.8	102.8
El Paso	97.8	96.8
Houston	101.9	102.8
San Antonio	97.1	95.9
CALIFORNIA		
Los Angeles County	126.5	n.a.
Sacramento	114.1	112.6
San Diego	131.0	129.2
FLORIDA		
Miami	110.1	109.9
Orlando	99.3	99.6
GEORGIA		
Atlanta	107.1	106.5
ILLINOIS		
Champaign-Urbana	101.7	101.5
INDIANA		
Indianapolis	99.3	100.1
MASSACHUSETTS		
Worcester	n.a.	121.1
MISSISSIPPI		
Jackson	104.6	109.2
MISSOURI		
Kansas City	95.1	96.7
St. Louis	97.5	98.7
NEW YORK		
Buffalo	107.2	109.7
Nassau-Suffolk PMSA	157.2	157.9
NORTH CAROLINA		
Charlotte	93.6	101.1
Raleigh	101.4	102.2
OHIO		
Cincinnati	n.a.	100.8
Cleveland	109.5	110.9
PENNSYLVANIA		
Philadelphia	127.2	127.2
Pittsburgh	102.5	104.7
VIRGINIA		
Richmond	107.2	108.8

+ Measures relative price levels for consumer goods and services in participating areas nationwide. The average for all places participating in the survey equals 100 and each participant's index is read as a percentage of the average for all places.

* The index is based on grocery items, housing, utilities, transportation, health care, and miscellaneous goods and services.

Home Prices and Residential Electric Costs
(ranked by average price of an existing home)

	(1) Average Price of an Existing Home, 1988	(1) Average Price of a New Home, 1988	(2) Typical Residential Electric Bill, 750 KWH* Jan-87
Indiana	$68,070	$122,596	$58.84
Michigan	$69,670	$108,279	$51.93
Missouri	$73,008	$110,042	$51.73
Ohio	$85,672	$132,063	$61.80
North Carolina	$94,714	$113,791	$58.17
Georgia	$99,538	$115,393	$46.13
Illinois	$105,083	$144,086	$54.60
Texas	**$112,090**	**$141,830**	**$51.24**
Florida	$118,450	$107,191	$56.61
Pennsylvania	$129,979	$168,320	$65.34
Virginia	$130,716	$111,732	$54.00
New York	$160,232	$193,420	$68.72
New Jersey	$176,826	$158,431	$72.54
Massachusetts	$180,884	$213,421	$59.40
California	$204,396	$165,275	$61.56

*These data include all energy used in a state, including energy in processes to refine other energy products. As a result, states with large refinery capacity, for example, will rank high.

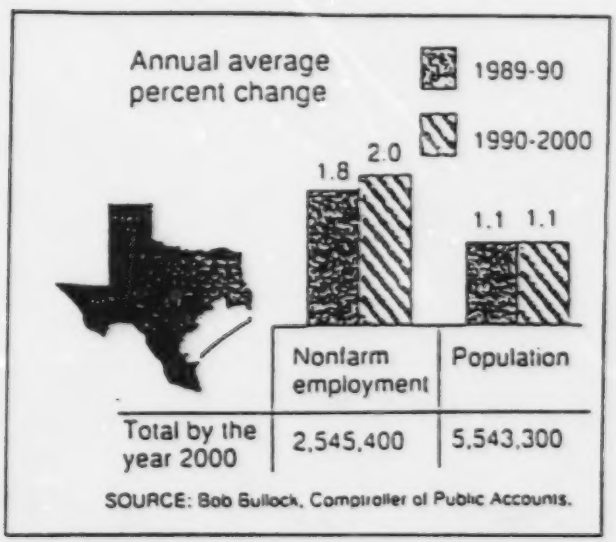
Sources:

(1) Wharton Econometric Forecasting Associates, Real Estate and Construction Service Short-Term State Tables, Spring 1989.

(2) U.S. Dept. of Energy, Energy Information Administration, State Energy Data Report, 1960-1986, October 28, 1988.

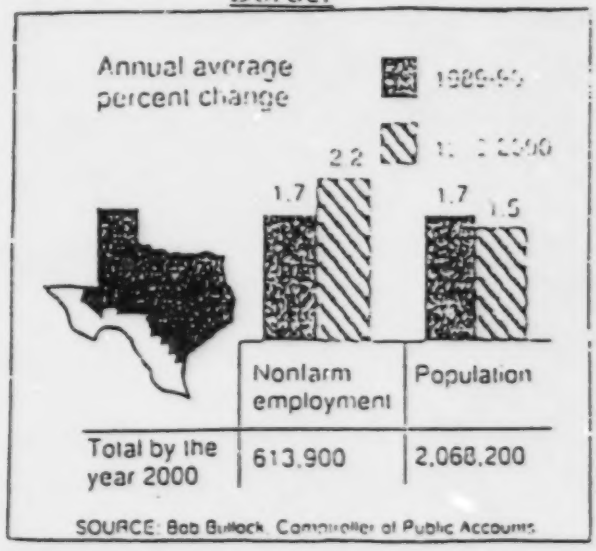
According to the Texas Comptroller of Public Accounts, the Texas regions which are expected to experience significant growth are the Gulf Coast region and the Border region. Population growth in the the Gulf Coast region, which encompasses Beaumont, Corpus Christi, Galveston and Houston, will most likely be a response to growth in industries led by high-tech electronics and computers, aerospace, plastics and the steel industry. In fact, according to an article in the Texas Economy -- a publication of the Texas Department of Commerce -- Houston and Dallas-Fort Worth real estate markets have the greatest potential for growth during the next five years.

Gulf Coast



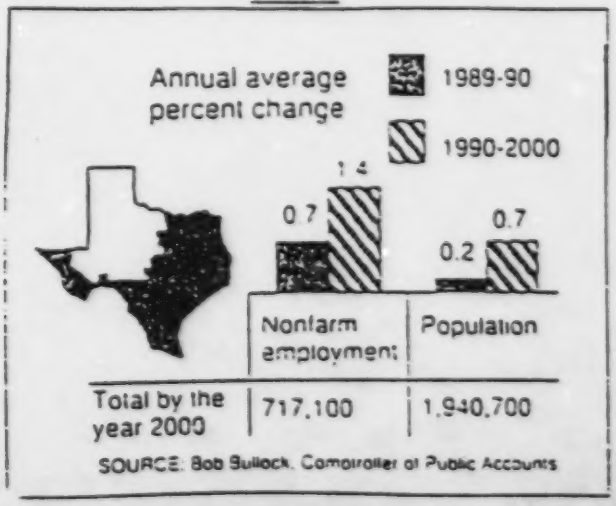
The Border region -- including El Paso, Laredo and Del Rio -- should continue to grow with the maquiladora (twin plant) activity and retail trade from Mexican citizens.

Border



The Northern Plains region will grow more slowly than most regions in Texas. According to the Comptroller of Public Accounts, the Plains economy is still feeling the effects of consolidations in the oil and gas industry. Manufacturing and services are expected to provide the fastest growth in this area.

Plains



B. *Trends in Business*

The business climate in Texas is attractive to companies of virtually any size interested in establishing, expanding, or relocating their operations. Reasons for its attractiveness include:

... Texas offers assistance to businesses and communities through a variety of state and local incentive programs designed to encourage economic growth;

... Texas cities are among the least expensive cities in the United States in which to rent manufacturing, warehouse, or office space; and

... Texas has the lowest average fuel and electricity costs among the fifteen most populous states.

Rental Rates for Selected Cities, 3rd Quarter1989
(Rate per sq. ft.)

Metropolitan Area	Office Space: Central Business District	Office Space: Non-Central Business District	Manufacturing	Warehouse
Austin, TX	$8 - 15	$7 - 19	$5	$3
Dallas, TX	$12 - 40	$7 - 28	$2 - 6	$2 - 6
Houston, TX	$13 - 21	$9 - 20	$2 - 3	$2 - 3
San Antonio, TX	$10 - 17	$9 - 18	$1 - 3	$1 - 3
Contra Costa, CA	$22 - 37	$12 - 33	$4 - 8	$4 - 8
Los Angeles, CA	$22- 37	$12 - 33	$4 - 8	$4 - 8
Newport, CA	$12 - 33	$19 - 31	$6 - 9	$4 - 13
Oakland, CA	$15 - 30	$19 - 25	$2 - 7	$1 - 7
San Francisco, CA	$15 - 40	$13 - 27	$5 - 8	$5 - 8
San Jose, CA	$14 - 33	$13 - 34	$3 - 9	$3 - 5
Boca Raton, FL	NA	$16 - 34	$4 - 5	$4
Ft. Lauderdale, FL	$19 - 26	$10 - 28	$4 - 5	$4
Miami, FL	$23 - 28	$13 - 30	$4 - 7	$4 - 6
Orlando, FL	$17 - 26	$13 - 24	$3 - 4	$3 - 4
Tampa, FL	$17 - 30	$12 - 25	NA	$3 - 6
Atlanta, GA	$17 - 27	$14 - 32	$2 - 3	$2 - 6
Chicago, IL	$14 - 45	$11 - 30	$3 - 8	$3 - 8
Boston, MA	$24 - 60	$13 - 32	$6 - 8	$4 - 7
Detroit, MI	$13 - 25	$9 - 26	$1 - 8	$1 - 8
Princeton, NJ	NA	$13 - 28	$4 - 7	$3 - 7
Long Island, NY	NA	$17 - 28	$4 - 7	$4 - 8
New York City, NY	$25 - 75	NA	NA	NA
Charlotte, NC	$17 - 22	$12 - 22	$3 - 4	$3- 4
Raleigh/Durham, NC	$17 - 19	$11 - 20	$4	$4
Philadelphia, PA	$16 - 35	$10 - 26	$3 - 5	$3 - 5
Pittsburgh, PA	$12 - 29	$8 - 20	$1 - 5	$1 - 7

Source: Cushman & Wakefield, Across the Nation, 3rd Quarter1989.

Infrastructure
(ranked by fuel and electric energy costs)

	(1) Fuel and Electric Energy Costs per Million BTUs for Manufacturing 1986	(2) Rural Roads Street Mileage 1988	(2) Urban Road Street Mileage 1988
Texas	$2.78	216,477	83,967
Virginia	$3.86	52,047	14,845
Missouri	$3.99	104,502	15,386
Indiana	$4.46	73,848	17,740
Ohio	$5.11	82,112	31,228
Georgia	$5.22	87,050	20,338
New York	$5.35	73,071	37,542
Michigan	$5.38	90,899	26,996
North Carolina	$5.61	75,242	18,571
Florida	$5.63	56,658	47,931
Illinois	$5.65	103,929	31,577
Pennsylvania	$5.71	88,382	27,702
New Jersey	$6.09	11,764	22,433
Massachusetts	$6.14	13,200	20,609
California	$6.38	91,376	71,186

Sources:

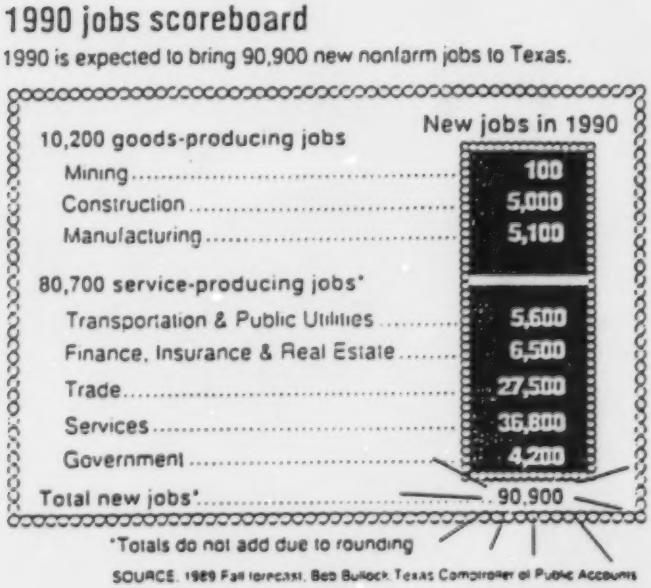
(1) Grant Thornton, Manufacturing Climates Study, June 1989.

(2) U.S. Dept. of Transportation, Highway Statistics, 1988.

Major businesses which have relocated their headquarters in Texas include:

... JC Penney
... GTE
... Fujitsu
... MCI and
... Exxon.

The Texas economy today is no longer based on agriculture. In fact, it is now based largely on services rather than on energy and construction. The service-producing sectors -- business and medical services, trade, finance, transportation and government -- have provided most of the new jobs in Texas over the past three years and, as indicated in The Texas Economy: Overview, a publication of Bob Bullock - Comptroller of Public Accounts, are likely to lead the economy over the next several years.


1990 jobs scoreboard
1990 is expected to bring 90,900 new nonfarm jobs to Texas.
New jobs in 1990
10,200 goods-producing jobs
Mining 100
Construction 5,000
Manufacturing 5,100
80,700 service-producing jobs*
Transportation & Public Utilities 5,600
Finance, Insurance & Real Estate 6,500
Trade 27,500
Services 36,800
Government 4,200
Total new jobs* 90,900
*Totals do not add due to rounding
SOURCE: 1989 Fall forecast, Bob Bullock, Texas Comptroller of Public Accounts

The following table illustrates the percentages of Texans employed in non-agricultural industry.

Non-Agricultural Employment By Major Industry
(1988 Data)

Industry:	Total %
Wholesale and Retail Trade	24.9
Services	22.9
Government	17.7
Manufacturing	14.4
Finance, Insurance, and Real Estate	6.6
Transportation and Public Utilities	5.9
Construction	4.9
Mining	2.8

Source: The Texas Report: Business Climate Comparison of the 15 Most Populous States, Research and Planning Division, Texas Dept. of Commerce.

The industries that appear to be growing are retail and services -- they are the leaders in employment. On the other hand, the construction industry -- especially new construction -- is down. According to the Texas Department of Commerce, the manufacturing industry is also experiencing slow growth, although it is fourth in the list of non-agricultural employment.

C. *Texas Travel Trends*

1. Travel Spending in Texas

Travel and tourism played a significant part in the Texas economy in 1988 as it has in previous years. According to the study on 1988 travel spending in Texas conducted by US Travel Data Center, nearly $17.0 billion was spent within Texas on travel during 1988, and directly provided jobs and income for 273.9 thousand residents. Travel expenditures generated a combined sum of nearly $2,082 million for federal, state and local governments, helping to finance public services enjoyed by Texans. Travel expenditures in Texas grew 8.1% in 1988 over the 1987 level of expenditures, surpassing the 1988 estimated national growth rate of 6.7%. The US Travel Data Center study indicates that the trend in travel spending growth which Texas enjoyed in the mid-1980s appears to have returned in 1988.

U.S. Travel Spending in Texas 1984-1988

Year	Expenditures ($ millions)	% Change from previous year
1988p	16,986.1	8.1
1987	15,719.5	0.2
1986	15,690.6	0.0
1985	15,685.4	4.4
1984	15,017.4	13.4

p = preliminary
Source: US Travel Data Center

Travel contributes considerably to the economy and the life style that Texas residents enjoy. The US Travel Data Center reports that if travel and tourism in Texas had suddenly ceased in 1988, the number of jobs in the state would have fallen 4.1%, and hundreds of businesses throughout the state might have closed. Furthermore, the average tax bill would have had to rise $118 per family, while local governments would have had to raise taxes $36 per family, to maintain the same level of public services. The quality of life enjoyed in Texas would have declined dramatically were travel expenditures by visitors to Texas to cease.

2. Travel Plans of Texans

In 1988, the Department of Recreation and Parks at Texas A & M University and the Texas Restaurant Association conducted a survey of Texans' plans to take overnight pleasure trips. Overall, 60% of the respondents anticipated taking overnight pleasure trips in 1988. Of these, 50% planned to vacation outside Texas. Among the findings of the survey are:

- . . . Fewer married respondents and parents anticipated travel plans in 1988 and those who did expected to take fewer trips;

- . . . The residents of Austin and the youngest age group (18-24 year olds) anticipated the highest number of trips last year (median of 7.0 and 5.0, respectively) (Since Austin is the site of the University of Texas, with many thousands of students in that age group, these two finding are probably correlated.);

... Hispanics reported the lowest propensity to travel in 1988. This group also expected to take the smallest median number of trips (2.0); and

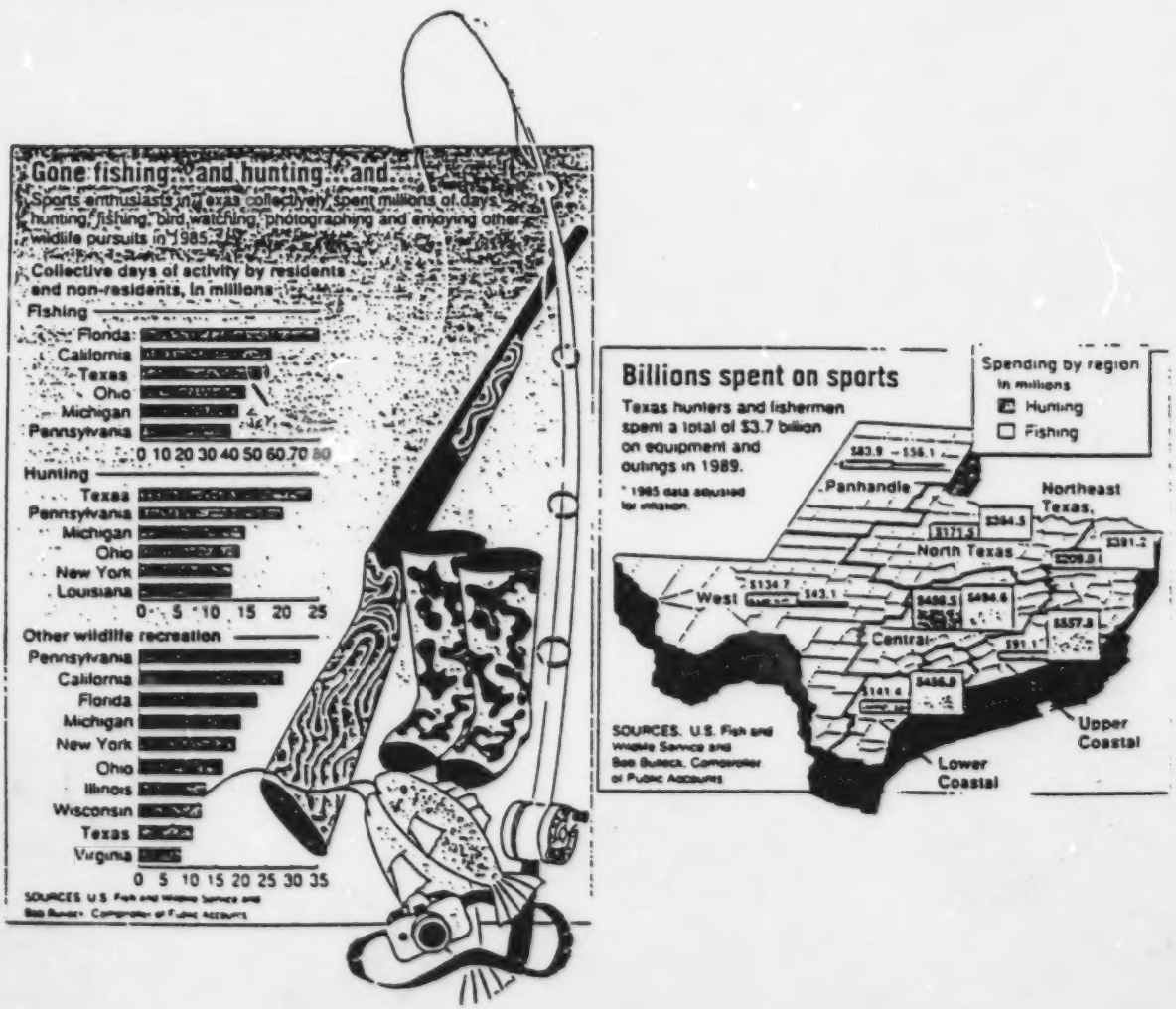
... Both the propensity for vacation travel and the average number of anticipated trips increased with reported income levels.

Resondents Planning Overnight Pleasure Trips

Respondents	n	Planning to travel? Yes%	No%	Trips
Total	600	60	37	3.0
Male	300	61	37	3.5
Female	300	60	36	3.0
Married	381	59	37	3.0
Not Married	218	62	35	4.0
Children at home	268	56	40	3.0
No child at home	332	64	33	4.0
Age 18-24	87	63	34	5.0
Age 25-34	163	61	35	3.0
Age 35-44	125	68	31	3.0
Age 45-64	147	59	37	3.0
Age 65 & older	72	49	46	2.0
White	417	67	29	3.0
Hispanic	95	45	54	2.0
Black	72	43	53	4.0
Income <$20,000	184	48	47	3.0
Income $20-50,000	290	67	31	4.0
Income >$50,000	70	74	26	4.0
Homeowner	400	60	37	3.0
Renter	181	64	34	4.0
Live in D/FW	121	65	31	4.0
Live in Houston	118	64	34	3.0
Live in San Antonio	45	53	40	4.0
Live in Austin	26	69	27	7.0
Other metro areas	165	57	41	3.0
Live in rural area	125	58	38	3.0
0-9 yrs in Texas	91	71	26	3.0
10-19 yrs in Texas	90	58	39	4.5
>20 yrs in Texas	416	59	38	3.0

Source: Department of Recreation and Parks, Texas A & M University and Texas Restaurant Association.

According to the US Fish and Wildlife Service and Bob Bullock, Comptroller of Public Accounts, Texans collectively spent millions of days in 1985 hunting, fishing, bird watching, photographing, and other wildlife pursuits in Texas. In a 1985 nationwide survey (the most recent available), Texas ranked first in the US in the total number of days in a year spent hunting by residents and non-residents. And, Texas ranked ninth in the US in outdoor recreation, which includes hunting, fishing, bird-watching, photographing, and/or just being in the presence of wildlife. Central and Northeast Texas spent the most money on hunting, although more total dollars were spent on fishing, led by Upper Coastal and Central Texas.



The survey by the US Fish and Wildlife Service also showed that Texans are willing to travel to enjoy wildlife. The survey indicated that Texans spent a total of more than 10 million days on outdoor activities more than a mile from home. Furthermore, Texans traveling on outdoor trips spent 37% of their time in other states.

D. *Air Service From Texas to Alberta*

Direct air service to Alberta from Texas is currently provided by American Airlines, and Northwest Airlines. Departures originate from Dallas and Houston and fly to Calgary and Edmonton only. The average rate for a regular coach one-way ticket from Dallas or Houston to Calgary or Edmonton is $353.92 (US).

Daily Direct Air Service From Texas to Alberta
(Rates as of mid-October, 1990 - quoted
by Travel Agents International,Portsmouth, NH in US dollars)

	American Airlines				Northwest Airlines			
	# Flights	Aircraft	First Class/ Coach	Rate	# Flights	Aircraft	First Class/ Coach	Rate
Dallas to Calgary	3	MD-80	12/130	$309.96	--	--	--	no s.
Dallas to Edmonton	1	MD-80	12/130	$322.00	--	--	--	no s.
Houston to Calgary	2*	MD-80	12/130	$386.64	--	--	--	no s.
Houston to Edmonton	1**	MD-80	12/130	$388.00	1	DC9 short	12/88	$363.(
Total number of direct flights from Texas to Alberta	5							
Total capacity	60/608							

* Included in number of flights from Dallas to Calgary.
** Included in number of flights from Dallas to Edmonton.

Note: Regular (non-special) round-trip fares are double the above listed prices.

Because of bilateral agreements between the US and Canada, commercial airlines do not have sole authority to expand their service -- that is, add new destinations or increase the number of flights. The Route Authority between the two countries ultimately determines if the airlines may expand their service. At present, Calgary and Edmonton are the only two cities in Alberta for which the commercial airlines have authority to serve. If the Route Authority can justify a need for more flights between Texas and Alberta, then airlines may be able to increase their present service to Alberta.

In Sum

Texas represents a large potential market by virtue of its large population (16,841,000), the presence of a relatively large number of military and other retirees, and its success in diversifying its economy and thus generally recovering from the conditions brought on in 1986 by sharp drops in oil prices. And, although the US appears to be entering a recession, Texas shows comparatively limited effects of a slowing economy. Unless current economic conditions across the U.S. deteriorate considerably the short run (one to three years) prospects for Texas appear good.

Three problems or obstacles appear which may serve to limit tourism to Alberta.

1) Available air service is one. The only direct service from Texas to Alberta originates in Houston and Dallas/Ft Worth, with five flights and 668 seats per day. These are major population centers. But, Texas is a big state and for many Texans the drive or the flight to either of these cities represents considerable time, effort, and dollars. It would appear that increases in air service would be required to support significant growth.

   Furthermore the strong trend toward trips of shorter duration ("getaway") may restrict the potential from the drive-in market (some 70% of all trips nationally are three nights or fewer.) It is anticipated that current gasoline price increases and an economic recession will further reduce the distance that the U.S. residents are willing to drive for a vacation trip.

Because higher gas prices also mean higher airfares, current forecasts suggest a significant reduction in air travel for vacation nationally.

2) The second is the availability of attractive outdoor vacation opportunities both in Texas and between Texas and Alberta, Canada. Texans do many outdoor activities -- hunting, camping, recreational vehicle traveling, skiing, sightseeing for example -- that are available in Alberta. These activities are also available in Texas, New Mexico, Colorado, Wyoming, and Montana to name some states through which prospective visitors to Alberta from Texas must drive. Texans will need a real reason to go farther than these states for what may be seen as a comparable vacation experience.

3) The third problem is the strong marketing programs with expanded budgets that these competitive areas are implementing. To some, in fact, the Texas Tourism advertising campaign based on the theme "Texas, Its Like A Whole Other Country" may be seen as being directly competitive to Canada's "The World Next Door."

In essence its population and ability to pay combined with a common oil based heritage suggest that Texas could be an attractive market for Alberta. However, careful consideration will be required to determine the level of effort required to effectively compete for visitors from Texas.

II. CURRENT VACATION PATTERNS AMONG TEXANS

Introduction

The purpose of this chapter is to set the stage for our analysis of the potential for travel to Alberta from Texas by examining the type of travel which Texans now enjoy. In so doing, we'll look at:

- . . . Frequency of vacation travel of various types, most of which might be enjoyed in Alberta;
- . . . Characteristics of a vacation trip which define it as a main or primary vacation trip; and
- . . . Characteristics of the last main or primary vacation trip taken.

In each area we will look at the differences among the three market segments -- young singles/couples without children, families with children, and older empty nesters without children at home. We'll begin with a look at the frequency with which these groups travel on qualifying vacations.

A. Frequency of Vacation Travel

Respondents were read descriptions of four different types of vacation trips and asked how frequently they had taken trips of each type during the past year -- from September of 1989 through August of 1990. The four trip types are:

1) The final destination was at least 1,000 miles away from home. You flew and spent two or more nights outside Texas.

2) The trip included five nights or more away from home, of which at least three nights were outside Texas and you drove.

3) The trip was taken within Texas during which you spent two nights or more away from home. This category includes both flying and driving trips.

4) Other trips of at least 1,000 miles away from home to a destination outside of Texas where you have combined both business and pleasure.

Most Texas residents in our key market segments have taken at least one trip among these four trip types during the past 12 months. Nearly eight in ten have taken one or more trips of any of these four types (78%).

The three market segments differ somewhat in their likelihood of taking trips of these types. Younger singles and couples without children at home are most likely to take such trips (82%) while the older, empty nesters without children are least likely to do so (74%).

Families with children at home are likely to take the smallest total number of trips on average (3.9), while younger singles/couples are likely to take the most trips (5.5).

All three market segments, however, appear to travel with sufficient frequency to be reasonable marketing targets for Alberta tourism development.

Frequency of Vacation Travel (Q.7)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Took one or more trips of these types	78	[82]	78	74
1 - 2	27	24	[31]	24
3 - 4	20	20	20	19
5 or more	31	[38]	27	31
Took none	22	[18]	22	26
Average	4.6	5.5	3.9	4.7

The most popular type of travel, not surprisingly, is that taken closer to home, within the state of Texas. These trips are taken by more than half of those in the three target segments overall (57%). Empty nesters are the least likely to have taken such trips within Texas during the past 12 months (50%) while both young singles/couples (63%) and families (58%) are more likely to have taken such trips. Among those who have taken in-state trips, however, the young singles/couples and empty nesters are likely to have taken more than the families (4.0 and 3.8 vs. 3.2).

An air trip to a destination at least 1,000 miles away was taken by four in ten during the past year (42%). Here the three segments differ dramatically with the young singles/couples most likely to take these trips (51%) and the families least likely to do so (34%). Empty nesters fall in between at 44%. Among those who have taken such trips, the average for all segments is about two trips during the year.

Driving trips of five nights or longer with at least three nights outside Texas are only slightly less popular overall with about a third having taken such a trip in the past year (37%). In this case, there is no difference among the three market segments in the likelihood or the frequency of taking such trips. For those who have taken such trips, the average number of trips for all three market segments is about two.

A combined business and pleasure trip to a destination at least 1,000 miles from home is least popular, taken by only a quarter (28%). Again, there is no difference across the three market segments in either the likelihood or frequency of taking such trips. For all three target segments, the average number of trips of this type among those who have taken such trips is between two and three.

Types of Vacation Trips Taken from September 1989 thru August 1990 (Q.7)

	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Two nights or more/within Texas/flew or drove				
One or more	57	[63]	[58]	[50]
1 - 2	33	33	37	28
3 - 4	12	14	10	12
5 or more	12	[16]	11	10
None	43	38	42	[50]
Mean	3.7	4.0	[3.2]	3.8
At least 1000 miles away/ two or more nights outside Texas/flew				
One or more	42	[51]	[34]	[44]
1 - 2	32	[38]	28	33
3 - 4	7	[10]	4	6
5 or more	3	3	2	5
None	58	[49]	[66]	[56]
Mean	1.9	1.9	1.8	2.3
Five nights or more away/three or more nights outside Texas/ drove				
One or more	37	36	37	38
1 - 2	31	30	32	31
3 - 4	4	4	3	5
5 or more	2	2	2	2
None	63	64	63	62
Mean	1.8	1.7	1.6	1.8
At least 1000 miles away/outside Texas/ combined business and pleasure				
One or more	28	30	28	27
1 - 2	20	22	20	19
3 - 4	4	5	4	4
5 or more	4	3	4	4
None	72	70	73	72
Mean	2.5	2.3	2.2	2.5

B. Features of a Main Vacation Trip

Texans were asked to identify one of the trips they had taken in the past 12 months as their main or primary vacation trip and to describe in their own words what made them consider that trip as the main one for them.

There is little concensus on what makes a main or primary vacation trip. Those who took only one vacation clearly saw that trip as their main vacation trip (12%). A few more said that their main trip was the longest one (23%). Some also described their primary vacation trip based on the activities they pursued (21%), or the destination they visited (20%). Fewer described it as a visit to friends and relatives (16%), a new and different experience (11%), their most expensive vacation (6%) or the one on which certain family members traveled (6%). Essentially, there is no generally accepted way to describe the main or primary vacation trip.

Young singles/couples are more likely than other groups to mention the length of the trip (29%), new and different experiences (14%) while families are more likely to mention the people who traveled with them (10%), but there is still no concensus.

Features of A Vacation Trip Which Make It The Main or Primary Vacation (Q. 9f)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Length of time	23	[29]	21	20
Activities (Net)	21	21	19	23
Travel/sightseeing/ scenery	6	4	5	8
Most relaxing	5	5	5	5
Educational	1	1	1	2
Romance/honeymoon	1	3	*	*
Participation in a specific event	1	2	1	1
Other activities	6	6	6	6
Other attractions	3	3	4	3
Destination (Net)	20	20	20	20
Importance of destination	7	5	7	9
Enjoyment level was high	6	7	6	6
Farthest away	5	6	5	3
Like the area	3	2	3	2
Especially like food/ accommodations	1	1	1	1
Convenient	*	*	*	*
Visit family and friends	16	[12]	17	18
Only vacation	12	13	13	11
New and different exerience (Net)	11	[14]	[11]	[8]
New and different/get away from home	8	9	8	7
Get away from work/ school	4	6	3	2
Cost of vacation (Net)	7	10	6	7
Cost the most money	6	8	5	5
Inexpensive	2	2	1	1
Household members included on trip (Net)	6	2	[10]	4
Entire family went	5	1	[8]	3
Went without the children	1	–	2	–
Were not visiting family	*	*	*	1

* Less than 0.5%.

Features of A Vacation Trip Which Make It The Main or Primary Vacation (cont.)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Climate (Net)	3	2	3	3
Time of year/summer	2	2	2	2
Weather	1	1	1	1
Personal	2	2	2	2
Business	1	2	1	1
Real estate/location	*	–	*	*
Other	3	2	3	3
Nothing	1	*	*	2
No answer/don't know	1	*	1	1

* Less than 0.5%.

C. *Primary Main Vacation Trip Characteristics*

In describing their main or primary vacation trip, most Texans described it as a vacation (62%) though some said it was a trip to visit friends or relatives (28%). These descriptors hold true for all three segments.

Just over half of all of the main vacation trips were taken during the summer (June, July and August), 1990 (53%). Not unexpectedly, families are most likely to take their main vacation during the summer (65%) when children are not in school. Young singles/couples are more likely than the other segments to take their main vacation during the winter season including December, January and February (15%), possibly to engage in winter activities such as skiing. Empty nesters are more likely than the other groups to take their main vacation in the fall (16%).

Essentially, Texans' main vacation trip is a long one -- averaging 9.1 nights away from home with most of those outside Texas (7.5). Not surprisingly, the longest trips are taken by the empty nesters -- 11.1 nights in total,with 9.9 of these outside of Texas. Indeed, most spent time outside the state on their main vacation (84%).

As we have seen, families are more likely to travel within Texas -- 30% of Texans families did not leave the state on their main vacation. Those who did travel outside Texas averaged only 6.0 nights outside of the state -- low in comparison to empty nesters (9.9) and young singles and couples (7.4).

Main vacation destinations outside Texas are quite varied. Three states have some popularity -- California (8%), Colorado (8%) -- especially among families (11%), and Florida (8%). Florida is more popular among families (10%) than among empty nesters (6%), suggesting the importance of Disneyworld in drawing Texas vacationers to the state.

Overseas trips are popular with the young couples/singles (10%) and the empty nesters (10%) but do not draw many families (3%). While Mexico draws some young couples/singles (6%) and families (4%), provinces in Canada were the main destination for only 2% of all trips outside Texas.

Given current patterns for main/primary vacations, then, it seems likely that the empty nesters with their longer trips and more days outside the state of Texas offer the best potential for travel to Alberta.

Characteristics of Primary/Main Vacation (Q. 8 & 9)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2151)	(598)	(941)	(611)
Those who took a vacation trip				
	%	%	%	%
Purpose (Q 9e)				
Vacation	62	60	62	64
Visit friends or relatives	28	30	28	28
Business/convention	8	8	8	7
Other	1	2	1	*
No answer	1	*	1	1
Season (Q 8a)				
Fall 1989	11	11	8	[16]
Winter 1989 - 1990	10	[15]	8	9
Spring 1990	20	24	[15]	25
Summer 1990	53	43	[65]	43
Don't recall	6	7	4	7
Length (Q 9a, b)				
Nights away/total	9.1	8.8	8.1	[11.1]
Nights outside Texas	7.5	7.4	6.0	[9.9]
Only in Texas	24	[21]	[30]	[16]
Any time outside Texas	76	[79]	[70]	[84]
Destination (Outside Texas) (Q 9c)	(1643)	(473)	(658)	(513)
Mountain states	22	19	24	22
Colorado	8	7	[11]	5
Nevada	6	5	5	8
Other	8	7	8	9
Pacific states	14	13	15	13
California	8	8	10	6
Other	6	5	5	7
South Atlantic states	14	14	16	12
Florida	8	8	10	6
Other	6	6	6	6
Other US	29	26	32	27
Overseas	7	10	[3]	10
Mexico	4	6	4	[1]
Canada	3	4	[1]	3

Texas travelers were read a list of activities and asked which they participated in during their last primary/main vacation.

Sightseeing of all types is the most popular vacation activity, acknowledged by 92% of the vacationers as part of their main or primary vacation. While fully 85% report that they did sightseeing, a majority also said they visited a national/state/provincial park or historic site (62%) or visited a zoo/museum/natural display (58%). Fewer than half took short guided excursions or tours (42%), with this activity more prevalent among the empty nesters (47%).

Shopping is, as always, a key activity on vacation. Fully three quarters of all Texas vacationers report shopping on their last vacation (76%) with the activity equally prevalent among all segments.

Outdoor activities were enjoyed by most Texas vacationers (71%) although the specific activities varied dramatically. Most say they participated in water sports (41%), hiking (30%), and fishing or hunting (26%). Many fewer report participation in golf (13%), trail riding (11%), fly-in fishing (11%), white water rafting (8%) or downhill skiing (5%).

Empty nesters are less likely than other groups to participate in these outdoor activities overall (58%), though they are as likely to report golf (14%), and hiking (27%). Among these older travelers, hiking may well be used to describe walking for pleasure -- rather than a more strenuous hiking or backpacking activity.

While two thirds of Texas vacationers say they participated in nightlife/recreational activities (66%), the interest varies dramatically among the three segments. Young singles/couples are most likely to report participation in night time activity (80%) while the empty nesters are least likely to do so (54%).

About two thirds of the Texas vacationers attended events or festivals with attendance fairly comparable across the segments. Families are least likely to attend cultural events (plays, concerts) (31%) while empty nesters are most likely to do so (41%).

Activities on Last Primary Vacation Trip (Aided) (Q. 11)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Sightseeing/Tours (Net)	92	92	93	91
Sightseeing	85	86	84	88
Visit a zoo/museum/ natural display	58	58	60	56
Visit a national park/ state or provincial park/historic site	62	58	63	63
Short guided excursions/ tours	42	41	39	[47]
Shopping	76	78	74	76
Outdoor/Adventure Activities (Net)	71	77	76	[58]
Any water sports	41	[44]	[50]	[24]
Downhill skiing	5	7	5	[2]
Golf	13	13	13	14
Hiking	30	30	33	27
Trail riding	11	12	13	[7]
White water rafting	8	[8]	[12]	[4]
Fly in fishing	11	9	[14]	9
Fishing or hunting	26	24	[30]	21
Other adventurous activities	28	32	30	[19]
Nightlife/recreational activities	66	[80]	[66]	[54]
Events/Festival (Net)	62	59	61	64
Attend small town festival, fairs or events	37	36	38	34
Attend cultural events (plays, concerts)	35	[36]	[31]	[41]
Attend a sport event	21	20	22	20
Visit friends/relatives	58	60	58	56

When asked to describe two activities or experiences they were seeking on their last primary vacation trip, Texas vacationers mention a variety of possibilities. About a third mention visits to family and friends (33%), outdoor activities (33%) and sightseeing/touring (30%). Nearly as many site specific attractions (27%) or simply rest/relaxation/fun (25%). As we have seen, empty nesters are less interested in outdoor activities (25%) and more interested in sightseeing/touring (38%) in comparison with the other market segments.

Activities or Experiences Sought on Last Primary Vacation Trip (Q. 9d)
Unaided

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Family (Net)	33	31	32	36
Visiting friends/ relatives - reunion	30	29	30	33
Family history	*	*	*	*
Personal	3	3	2	4
Outdoor Activities (Net)	33	34	37	[25]
Sun/sunbathing/swimming/ beach	10	[10]	[14]	[5]
Fishing	8	6	8	7
Watersports	7	9	8	[4]
Camping	3	3	4	2
Hiking/jogging/bicycling	3	2	4	2
Skiing/winter sports	3	6	3	2
Golf	2	2	2	4
Scenery	2	1	1	3
Hunting	1	2	1	1
Health/outdoors	1	1	*	1
Take pictures	*	*	*	*
Tennis	*	–	*	*
Sightseeing/touring	30	27	26	[38]
Attractions (Net)	27	26	27	27
Shopping	6	7	5	6
Gambling	4	3	3	5
Disneyland/Disneyworld	3	2	5	1
Theatre/museums/art	2	2	2	4
Special events	2	2	2	3
To watch/participate in competition	2	2	3	1
National parks/parks	2	2	2	2
Horse ranch/horse shows	1	1	1	1
Other attractions	8	6	9	6
Relaxation/pleasure/fun/ recreation/vacation	25	26	25	23

* Less than 0.5%

Activities or Experiences Sought on Last Primary Vacation Trip (cont'd) (Q. 9d)
Unaided

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Something different/getting away	7	[10]	6	6
Business	4	5	3	3
Nightclubs/entertainment	2	3	2	3
Educational experience	2	2	1	2
Dining	1	1	1	2
Romance	1	3	*	*
Cruise/sea voyage	1	1	*	1
Real estate/new home–	*	–	*	1
Other	2	2	2	2
Not stated/don't know–	*	–	–	*

* Less than 0.5%.

Vacationers were asked to assess how important various attributes were in selecting the destination for their last primary vacation trip. For each item they were read, vacationers were asked to rate its importance using a one to five scale where a one means the attribute is not at all important and a five means the attribute is very important. Our analysis is based on the proportion indicating "very important" for each attribute.

The key criterion in selecting a primary vacation destination seems to be finding a place to relax. Fully 58% of all Texas vacationers indicate that "a place to relax" is very important in selecting a vacation destination. Not surprisingly in today's economic climate, the item which is very important to nearly half the vacationers is "value for your dollar spent" (46%). Interestingly, young singles/couples are less likely than the other two groups to cite this dimension as very important.

Nearly as many vacationers consider "having lots of things to do" (41%), "natural beauty" (41%) and "something new and different" (37%) very important in selecting a vacation destination. No other dimension is considered very important by as many as a third of the Texas vacationers.

There are, however, some interesting differences for the empty nesters.

Compared with the other groups, more empty nesters consider some key Alberta characteristics to be very important in selecting a vacation destination:

- ... Natural beauty (51% vs. 40% for families and 33% for young singles/couples);
- ... Mountain scenery (30% vs. 24% and 22%); and
- ... A sense of history (28% vs. 17% and 12%).

At the same time, empty nesters are less likely to consider some of Alberta's other characteristics very important:

- ... Water experiences such as swimming, sunbathing or boating (17% vs. 34% for families and 28% for young singles/couples);
- ... Outdoor activities such as camping, hiking (14% vs. 23% and 24%); and
- ... Adventure activities such as river rafting, trail riding, fly-in fishing, mountain climbing (14% vs. 25% and 26%).

Clearly, then, any communications designed to attract empty nesters from Texas to Alberta will need to focus on the province's natural beauty, mountain scenery, and a sense of history.

Importance of Various Factors in Choosing A Vacation Destination (Q. 10)

	TOTAL		Key Market Segments: Young Singles/ Couples		Families		Empty Nesters	
BASE: (weighted) Those who took a vacation trip	(2151)		(598)		(941)		(611)	
	%	#	%	#	%	#	%	#
"Very Important"								
A place to relax	58	4.3	55	4.2	61	4.4	58	4.2
Value for your dollar spent	46	3.9	40	3.8	48	4.0	46	4.0
Having lots of things to do	41	3.9	39	3.8	43	3.9	39	3.8
Natural beauty	41	3.7	[33]	3.5	[40]	3.7	[51]	3.9
Something new and different	37	3.6	39	3.7	38	3.7	[34]	3.5
Budget accommodations	28	3.3	25	3.1	[32]	3.5	24	3.2
Water experiences such as swimming, sunbathing or boating	27	3.0	[28]	3.1	[34]	3.3	[17]	2.4
Mountain scenery	26	2.9	22	2.8	24	2.8	[30]	3.1
High quality or luxuary accommodations	23	3.1	[19]	3.0	24	3.2	26	3.2
Adventure activities such as river rafting, trail riding	22	2.7	26	2.9	25	2.9	[14]	2.1
Outdoor activities such as camping, hiking	21	2.7	24	2.8	23	2.9	[14]	2.2
Shopping	21	2.8	[15]	2.6	24	2.9	22	2.9
Sense of history	19	2.9	[12]	2.6	[17]	2.9	[28]	3.2
Sense of wilderness	18	2.7	18	2.8	19	2.7	16	2.5
Distance to your destination	16	2.6	14	2.6	16	2.8	17	2.5
Fully serviced campgrounds	14	2.1	[8]	1.9	17	2.3	14	1.9
Downhill skiing	7	1.5	[10]	1.8	6	1.6	4	1.3

Mean on a 1 - 5 scale where 5 is most postive.

Interim Summary

The findings of this chapter may be summarized as follows:

- . . . Texans in key market segments do travel both long distances and for long periods of time. And, many of them do so with reasonable frequency.

- . . . While traveling within the state is most popular, a sizable number travel outside the state on relatively long trips to a broad variety of destinations.

- . . . There is no concensus on what makes a primary or main vacation.

- . . . Colorado, California and Florida are the key U.S. destinations visited outside Texas by Texans. Anywhere in Canada was the destination for a primary vacation for only 2% of Texans in the key markets.

- . . . Texas vacationers participate in a variety of activities while on their main vacation including sightseeing, outdoor activities, shopping and nightlife.

- . . . Among the attributes considered very important in selecting a destination to many Texans are finding a place to rest and relax, in an area of natural beauty with lots to see and do which provides good value for the dollar.

. . . Empty nesters would appear to be the strongest target market in Texas since they take longer trips with more nights outside Texas. They are less interested in outdoor, adventure or water activities and more interested in natural beauty, mountain scenery and a sense of history. Those attributes of Alberta's resource will be most appealing to empty nesters.

Let's turn now to Texas vacationers' experience with Alberta.

III. ALBERTA AS TEXANS KNOW IT

Introduction

The purpose of this chapter is to understand how Texans view and have experienced Alberta. In doing so, we'll look at:

. . . Awareness of Alberta;

. . . Prior visitation to Alberta; and

. . . Likely future visitation to Alberta.

We'll begin with a look at awareness.

A. Awareness of Alberta

The vast majority of Texans in the key target markets are aware of Alberta or some location within the Province as a vacation destination. More than two thirds of these Texans have heard of the Province of Alberta as a place to which they might go on vacation (69%) and fully nine in ten know either the Province's name or the name of some area in the Province (90%).

Although the questionnaires used are quite different, it is possible to compare some of these findings with those encountered in Texas during a previous survey conducted by Davidson-Peterson Associates for Alberta Tourism. In 1986, then, only half the Texas market surveyed was aware of Alberta or places in Alberta as a vacation destination (49%). The 1990 figure of 90% shows significant improvement in awareness for the Province.

Both the Canadian Rockies (76%) and Calgary (74%) are more widely known than is the province name, Alberta (69%). The Winter Olympics held in Calgary and the Rockies most likely had a strong impact in communicating these place names to the Texas population. Jasper (46%), Lake Louise (32%), and Banff (27%) -- places not so often mentioned in Olympic coverage -- are much less widely known, although they are strong vacation destination areas.

One Texan in seven reports that he/she has previously visited Alberta or a location within the Province (15%). In 1986, the comparable figure was 9%, suggesting an increase in visitation since that time. Only 2%, however, have visited the Province from Texas in the 12 months prior to interviewing.

It is interesting to note that only three fifths of those who visited Alberta say they visited the Province (9%).

Awareness of and Visitation to Alberta (Q. 20, 22, 23)

	TOTAL		
BASE: (weighted)	Heard of (2774)	Ever Visited (2774)	Visited Past 12 Months (2774)
Alberta (Net)	90	15	2
Canadian Rockies	76	10	1
Calgary	74	9	1
Alberta	69	9	1
Edmonton	58	6	1
Jasper	46	5	*
Lake Louise	32	6	1
Banff	27	6	1
No Alberta	10	85	98
British Columbia	83	NA	NA

* Less than 0.5%

Most in the Texas market say that Alberta is "In Canada" (63%) -- but give no further information to locate the Province specifically. Only 2% correctly locate the Province with respect to British Columbia and/or Saskatchewan or north of Montana.

Location of Alberta (Q. 21)

	TOTAL	Have Visited Alberta
BASE: (weighted)	(2774)	(420)
	%	%
Heard of Alberta (Net)	90	100
In Canada (no further information)	63	72
Western Canada	6	16
Between British Columbia and Saskatchewan/East of British Columbia/West of Saskatchewan	2	6
Canadian Rockies	1	1
North of Montana	2	4
Other	5	6
Don't know/no answer	16	5
Never heard of Alberta/not asked	10	–

Totals add to more than 100% due to multiple mentions.

B. *Prior Visitation to Alberta*

As noted, 15% of Texans in the key markets say they have visited Alberta, with 2% having done so in the 12 months prior to interviewing.

Visitation to Alberta (Q. 22 & 23)

	TOTAL
BASE: (weighted)	(2774)
	%
Visited Alberta (ever)	15
In past 12 months	2
Prior	13
Never visited Alberta	85

Among those who have visited Alberta, most say they have visited the Province within the past ten years (1980 and later -- 58%). About a third of the visitors came to Alberta prior to 1980 (35%) and a few just don't remember when they visited Alberta (7%).

The most popular vacations in Alberta are those on which visitors tour the area or participate in outdoor activities. More than a quarter of the visitors say they took a touring vacation (29%) and about a fifth said they took an outdoor vacation (18%). Business travel -- both combinations of business and pleasure (12%) and purely business or convention trips (11%) also make up a sizable proportion of the Alberta visitor group from the Texas market. Many fewer were involved in the other types of vacations which might be taken in Alberta.

Travel to Alberta (Q. 23 - 25)

		Have Visited Alberta	
BASE:	Those who have visited Alberta (weighted)	(420)	
		%	
Last visited			
	Past 12 months	13	
	1985 - 1989	27	
	1980 - 1984	18	
	1970 - 1979	20	
	Prior to 1970	15	
	Don't recall	7	
Type of Vacation			
	Touring vacation	29	
	Outdoor vacation	18	
	Visiting friends and relatives	12	
	Combined business and pleasure	12	
	Business/convention	11	**
	Resort vacation	8	
	Tour/city trip	3	
	Skiing	2	
	Golfing	*	
	Don't recall	6	

* Less than 0.5%
** Includes 1% additional mentions in Q26.

C. *Likely Future Visitation to Alberta*

Very, very few Texans say they are planning a future trip to Alberta. Only one Texan in 100 says that he/she is definitely planning a trip to Alberta and only two in 100 say they are considering such a trip.

At the same time, nearly one third of the Texans say that they would consider traveling to Alberta (31%). Clearly there is some potential for Alberta among these Texans -- though they need more information and help before they could seriously plan such a trip.

Those who would consider a trip to Alberta are most likely going to take such a trip during the most popular summer season (45%). Fewer than half as many say they might visit Alberta in the spring (18%) and fewer still think either fall (11%) or winter (8%) would be when they would visit Alberta.

Likely Future Visitation to Alberta (Q. 28)

	TOTAL	Have Visited Alberta
BASE: (weighted)	(2774)	(420)
	%	%
Planning an Alberta Trip (Total)	1	3
Have completed planning for an Alberta trip	*	*
Definitely planning on it	1	3
Considering/Would Consider (Total)	34	42
Considering a trip to Alberta	2	4
Not presently considering, but would consider	31	38
Wouldn't consider	48	40
Don't know/not sure	17	15

* Less than 0.5%.

D. *Visitors/Potential Visitors*

Texas travelers who have visited Alberta are upscale in comparison with the total travel market in the state.

- . . . Most Alberta visitors are from households where the chief wage earner has a white collar occupation (70%) and has attended college (82%).

- . . . More than a quarter of visitor households have annual incomes of more than $60,000 (29%).

- . . . Most of the visitors are from households with a medium or high score on the socioeconomic scale (74%).

Visitors to Alberta are likely to be older, on average, (46.7) and to have modestly smaller families (2.1) than those who have not visited the Province. More visitors are also men, perhaps correlating with the business/convention travel to Alberta noted earlier.

Nearly half of the past visitors are in the empty nester market segment (43%), a segment which we have noted seems to have the most opportunities to travel the distances required for a visit to Alberta. While visitors come from all parts of Texas, the largest proportion are from the Dallas-Ft. Worth area (27%), and the smallest from the North Texas area (9%).

Looking at those Texas travelers who have not visited but say they would consider visiting Alberta in comparison with those who have not visited and would not consider visiting the Province, we note that considerers are similar in some ways to those who have already visited.

... Considerers tend to be from households where the chief wage earner has a white collar occupation (66%) and some college experience (75%).

... Most considerers are also from households with a medium or high score on the socioeconomic scale (73%).

... Considers are also from Dallas-Ft.Worth, Houston and Southeastern Texas.

At the same time, considerers have some characteristics in common with those who have not visited and would not consider Alberta as a vacation destination.

... Both considerers and non-considerers are the same age -- about 40 on average.

... Nearly half of each group are in the families market segment, and the proportion in the empty nesters group is smaller for both considerers and non-considerers.

... Both considerers and non-considerers, then, have larger families (2.3 on average).

Demographic Profile

	TOTAL	Have Visited Alberta	Have Not Visited: Would Consider	Have Not Visited: Would not Consider
BASE: (weighted)	(2774)	(420)	(707)	(1578)
	%	%	%	%
Occupation of chief wage earner				
White collar	62	70	66	[58]
Blue collar	29	[21]	28	32
Education of chief wage earner				
High school or less	30	[17]	[24]	[36]
Some college	27	25	27	28
College graduate	42	[57]	48	35
Household income				
$25,000 and less*	12	10	8	[14]
$25,001 - $40,000	40	[29]	40	42
$40,001 - $60,000	24	24	28	23
$60,001 and more	16	[29]	[18]	[12]
Refused	8	9	5	9
Socioeconomic Status				
Low Score	24	16	20	[29]
Score 3	10	4	7	13
Score 4	14	12	13	16
Medium Score	44	43	45	44
Score 5	14	9	12	[16]
Score 6	14	16	15	13
Score 7	16	18	18	15
High Score	23	31	28	[17]
Score 8	15	17	20	[12]
Score 9	8	[14]	[8]	[5]
Household size (average)	2.3	2.1	2.3	2.3
Children under 6	22	[14]	22	24
Children 6 - 12	22	19	23	21
Teenagers (13 - 17)	18	15	19	18
Average age	41.5	[46.7]	40.3	40.5
Ethnic Background				
Caucasian/white	80	[88]	[82]	[77]
Hispanic	10	[3]	11	11
Black	7	4	5	8
Other	3	5	3	3

* Students and retired only.

Demographic Profile (cont.)

	TOTAL	Have Visited Alberta	Have Not Visited: Would Consider	Have Not Visited: Would not Consider
BASE: (weighted)	(2774)	(420)	(707)	(1578)
	%	%	%	%
Gender				
Male	43	[54]	43	40
Female	57	[46]	57	60
Region				
West Texas	12	13	9	12
North Texas	11	9	8	12
Southeast Texas	19	17	21	18
Dallas Ft Worth	24	27	20	[21]
Austin/San Antonio	11	12	[illegible]	12
Houston	24	22	25	24
Marketing Segments				
Young singles/couples (income more than $25,000)	26	23	27	27
Families (income more than $25,000)	44	[34]	45	46
Empty nesters (income more than $25,000)	30	[43]	28	27
Likelihood of Travel				
Planning	1	3	–	–
Considering	34	42	100	–
Not considering	59	50	–	90
Conversion steps				
Planning	1	3	–	–
Considering	2	4	–	–
Can locate, would consider	5	10	12	–
Can locate, would not consider	4	10	–	5
Cannot locate the Province specifically, would consider	27	28	88	–
Cannot locate the Province specifically, would not consider	44	30	–	68

Interim Summary

The findings of this chapter may be summarized as follows:

- . . . Most Texans are aware of Alberta -- or the places in Alberta -- as vacation destinations. Only a minority, however, have ever visited the Province.

- . . . On an aided basis, only a minority recognize the Alberta tourism slogans.

- . . . Most of those who have visited Alberta have done so since 1980, usually traveling on a touring or outdoors vacation.

- . . . At present, very, very few Texans are considering or planning a vacation to Alberta. Those who would consider such a trip represent a reasonable sized group within the Texas market.

- . . . Those who have already visited Alberta tend to be from the upper socioeconomic strata -- from households where the chief wage earner has a white collar job and some college experience. A higher than average proportion of prior visitors are from the empty nester segment.

- . . . Those who would consider Alberta as a vacation destination are similar in some ways to visitors -- they are modestly upscale. But, they are also younger and have larger families -- more like those who would not consider Alberta as a vacation destination.

. . . Considerers are most likely to live in the major metropolitan areas of Dallas-Ft.Worth and Houston as well as the southeastern Texas area. This bodes well for Alberta since these citites are the primary airlinks to the Province. Marketing communications could be concentrated in those areas.

Let's turn to how we can reach those prospective visitors in the Texas travel market.

IV. HOW CAN THE TEXAS MARKET BE REACHED

Introduction

In order for Alberta Tourism to reach the Texas travelers and effectively market itself as a vacation destination to Texans, three questions need to be answered.

- . . . How far in advance do Texans plan their vacations?
- . . . What types of information are they looking for -- what information do they feel they need to plan their vacation?
- . . . What are Texans' travel information and media preferences -- what resources can Alberta use to reach the Texas travel market?

These are the three questions that we will address in this chapter.

We'll begin first by looking at when Texans are seeking travel information.

A. *Vacation Travel Planning*

As expected when people look for travel information depends on when they take their vacations. As we have seen the majority of Texans took their last primary vacation in the summer (53%). This was particularly true for families, 65% of whom took their vacation in the summer when their children are out of school. One-quarter of the empty nesters (25%) and young singles and couples (24%) took spring vacations. The largest percent of those taking winter vacations are the young singles and couples (15%), those likely to be most involved in winter activities and sports. More empty nesters take fall vacations than other market segments (16%), reflecting the tendency for this group to want to wait until a less busy period after children are back in school to travel.

Beginning Month of Primary Vacation Trip Of The Last 12 Months (Q. 8a)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted) Those who took a vacation trip	(2151)	(598)	(941)	(611)
	%	%	%	%
Fall 1989 (Total)	11	11	8	[16]
September 1989	4	4	4	6
October 1989	3	3	2	6
November 1989	3	3	2	5
Winter 1989-90 (Total)	10	[15]	8	9
December 1989	5	8	4	4
January 1990	2	2	2	1
February 1990	3	4	2	4
Spring 1990 (Total)	20	24	[15]	25
March 1990	6	7	6	5
April 1990	6	5	4	9
May 1990	9	12	5	11
Summer 1990 (Total)	53	43	[65]	43
June 1990	19	15	[22]	17
July 1990	17	13	[22]	14
August 1990	17	15	[21]	11
Don't know/no answer	6	7	4	7

Texans have a relatively short travel planning horizon.

... Three-quarters of those who took a vacation made their final decision about their destination within three months of the time of their vacation (74%). Of the balance, 14% made the final decision four to six months in advance and only 11% decided seven months or more before they were to go.

... Further, nearly two-thirds only began to think about planning where they would go in the three months prior to leaving on their vacation (60%). About one-fifth began the planning process four to six months prior to leaving (19%) and a similar proportion began planning seven months or more in advance (20%.)

Thus information to support the planning process will be most effective if received during the spring and early summer. Communications designed to put Alberta on the list of destinations to be considered for vacation might well be scheduled somewhat earlier in the year.

Vacation Planning Process (Q. 8a - 8c)

BASE: Those who took a vacation trip ** (weighted)	Final Decision (2919) %	Began Planning (2919) %
3 months or less from time of primary vacation	74	60
4 - 6 months from time of primary vacation	14	19
7 months or more from time of primary vacation	11	20
Don't know	*	1

* Less than 0.5%
** This base includes entire sample not simply the key market segments.

B. <u>What Types of Information Do They Need?</u>

<u>Texans say they need a wide variety of information to meet their travel planning requirements</u>.

. . . Lodging and dining information is what the largest percent of Texans say they need (38%). However, a smaller proportion of empty nesters look for this type of information (28%) -- it's families (43%) and young singles/couples (43%) who are more likely to say they need it.

. . . Approximately one-quarter of Texas residents say they want maps and information about routes (28%) as well as places to visit and things to do (25%) to plan their vacations. Fewer empty nesters are likely to seek out information about accommodations (26%) or places to visit or things to do (22%). Fewer than one-fifth of Texans need transportation information (18%) and one-tenth or fewer look for information about cities (10%), weather (4%) or specific activities (3%), such as fishing, skiing or golf.

Types of Information Required (Q. 12)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Lodging and Dining (Net)	38	43	43	[28]
Hotels/motels	35	41	40	[26]
Restaurants	5	5	6	4
Campgrounds	3	2	4	2
RV facilities	2	1	2	2
Maps/routes	28	27	30	27
Places to visit/things to do	25	26	27	22
Transportation information	18	20	17	17
City information/cities	10	10	10	9
Other places to get information	8	6	8	8
Weather	4	4	4	4
Activities (Net)	3	3	3	3
Golf courses	1	2	1	1
Fishing	1	1	1	2
Skiing	1	1	1	*
Other	31	31	30	32
No answer	7	3	7	10

* Less than 0.5%.

Texans turn to a number of sources to gather information to meet their planning needs -- especially to personal contacts.

... Almost half of all Texans use travel organizations of some sort (48%), primarily travel agents (36%).

... More than one-third use various types of literature (38%), often contacting a government tourism department for literature (15%).

... About one Texan in four gathers information on travel from friends, family or co-workers -- the personal references for travel (23%).

Usual Sources of Information Sought (Q. 13)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Travel Organizations (Net)	48	49	46	52
Travel agent	36	38	34	36
Automobile club	6	7	4	8
Travel club	6	4	7	6
Tour operator or organizer	3	2	3	3
Contact airline directly	1	1	*	1
Motorcoach or bus	1	1	*	1
Literature/media (Net)	38	37	40	37
Government tourism department for literature	15	14	17	12
Use hotel/resort/ airline/tour operator brochures	11	10	11	11
Magazines/travel/books/ newspapers	6	6	4	8
Maps/atlases/directories	5	3	5	6
Go to library	3	4	3	3
1-800 number	2	3	3	2
Clip-out coupons from magazine	2	2	2	2
Pop-up cards from a magazine	2	2	2	2
Friend or family/fellow employee	23	26	23	20
Other	4	4	4	4
None	7	5	7	9
No answer	1	–	1	1

* Less than 0.5%

C. How Can They Be Reached?

We will look at four means of reaching and providing information to the Texas vacation market and the variations among the three Texas target markets. The four ways are magazines, newspapers, automobile clubs and consumer shows which include sports shows and the Texas State Fair.

The most popular magazine asked about was Reader's Digest -- more than one-third of Texas residents read it (38%) and nearly half of them (18%) say they read it very thoroughly. Half of the empty nesters market subscribe to or read Reader's Digest regularly (51%) and one-quarter read it very thoroughly (27%). Alberta Tourism should consider Reader's Digest as a print medium to reach the key segment of empty nesters.

The second most popular magazine is National Geographic, read by 30% of Texans. Again, more empty nesters read this magazine (35%) and read it more thoroughly (14%) than either the family market (29%) or young singles/couples (25%). Considering the travel orientation of this magazine, and its popularity among Texans and particularly empty nesters, National Geographic would appear to be a good candidate for Alberta Tourism advertising.

People and Time are read by fewer Texas residents (23% and 22% respectively). Not surprisingly, Modern Maturity is read most often by empty nesters (52%).

Other magazines are read by few in the Texas market.

Magazine Readership (Q. 19a & 19b)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(277[a])	(731)	(1212)	(832)
	%	%	%	%
Readers Digest	38	26	36	[51]
Read very thoroughly	18	11	17	[27]
National Geographic	30	25	29	[35]
Read very thoroughly	11	8	10	[14]
People Magazine	23	21	25	22
Read very thoroughly	8	7	8	8
Time Magazine	22	[26]	21	21
Read very thoroughly	8	[12]	7	7
Modern Maturity	19	4	5	[52]
Read very thoroughly	6	1	1	[17]
Travel and Leisure	11	11	8	14
Read very thoroughly	4	4	2	5
Endless Vacation	2	3	2	4
Read very thoroughly	1	*	*	1
Sunset Magazine	1	*	2	2
Read very thoroughly	*	–	*	1

* Less than 0.5%.

The only two newspapers which have substantial readership and might be considered for advertising are the Houston Chronicle-Post (22% subscribe/read) and the Dallas Morning News (15%).

Newspaper Readership (Q. 19c)

		Key Market Segments		
	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Local/Regional Newspapers (Net)	72	74	70	71
Dallas Ft Worth (Subnet)	27	29	[23]	31
Dallas Morning News	15	15	12	18
Dallas Times Herald	7	8	6	7
Ft. Worth Star Telegram	9	10	7	10
Houston Chronicle-Post	22	25	22	20
Corpus Christi (Subnet)	3	3	4	2
Corpus Christi Caller	1	1	2	1
Corpus Christi Times	*	*	*	–
Corpus Christi Caller Times	2	2	2	1
El Paso (Subnet)	2	2	2	3
El Paso Times	2	1	1	2
El Paso Herald Post	1	1	1	1
San Antonio (Subnet)	7	6	8	6
San Antonio Express News	4	3	4	4
San Antonio Light	4	3	5	3
Austin American Statesman	5	6	6	4
Amarillo	2	2	2	2
Beaumont Enterprise	2	2	2	2
Lubbock Avalanche Journal	2	2	2	3
Waco	1	1	1	1
Wichita	1	1	1	1
National Newspapers (Net)	7	[10]	6	7
Wall Street Journal	5	7	4	6
USA Today	2	4	2	2
Other	29	[21]	31	32

Most Texans do not belong to automobile clubs (75%). Empty nesters, however, are more likely than families to belong to automobile clubs and therefore use the clubs as sources of information for their travel planning needs. One-third (33%) of empty nesters are members, compared with one-fifth of families (21%) and one-quarter of young singles/couples (24%).

Membership in Automobile Club (Q. 15)

	TOTAL	Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Members (Net)	25	24	21	[33]
AAA Texas	14	15	[11]	18
Other auto club	11	9	11	14
Non-members	74	76	79	[67]

Sports or outdoor activity shows and the Texas State Fair are attended by about half the Texans in key markets.

... Half the Texans in key markets have attended the Texas State Fair (48%) at some point. On average, they attended 1.4 times in the last 3 years. More empty nesters have attended at least once in their lifetime (52%), but they have not attended so many Fairs recently (1.1 times in the last three years). Young singles/couples are most likely to have attended recently (1.8 visits in the last three years).

... Sports or outdoor activity shows have also been attended by half the Texans (46%). Such shows are less popular among empty nesters (39% have attended).

... Many fewer Texans have attended a consumer show which has travel information (19%). On average, they have gone to nearly two such shows in the past three years.

... About one-fifth of the young singles/couples market have attended a ski show (21%) whereas only 13% of empty nesters have done so.

Attendance at Various Shows (Q. 17)

	TOTAL	Key Market Segments: Young Singles/ Couples	Families	Empty Nesters
BASE: (weighted)	(2774)	(731)	(1212)	(832)
	%	%	%	%
Have visited the Texas State Fair	48	48	47	52
Average number of visits in the past 3 years	1.4	1.8	1.5	1.1
Have visited a sports or outdoor activity show	46	51	48	[39]
Average number of visits in the past 3 years	10.0	11.2	9.8	8.7
Have visited a consumer show which included travel information	19	17	19	21
Average number of visits in the past 3 years	1.9	[2.3]	1.8	1.6
Have visited a ski show	17	21	18	[13]
Average number of visits in the past 3 years	1.4	1.6	1.5	1.1

Few Texans consider any of these consumer shows very useful in learning about travel destinations, helping gather travel information or helping make travel plans.

Usefulness of Various Shows for Collecting Travel Information (Q. 18)

	TOTAL		Key Market Segments: Young Singles/ Couples		Families		Empty Nesters	
BASE: (weighted)	(2774)		(731)		(1212)		(832)	
	%	#	%	#	%	#	%	#
Very useful in increasing awareness of travel destinations								
Consumer shows	12	2.4	10	2.5	14	2.5	11	2.2
Sports shows	10	2.2	9	2.2	[13]	2.4	7	1.9
The State Fair	8	2.0	7	2.0	9	2.1	8	1.9
Ski shows	4	1.6	5	1.8	5	1.6	[2]	1.4
Very useful in helping to make travel plans								
Consumer shows	10	2.3	10	2.3	12	2.4	10	2.1
Sports shows	7	2.0	8	2.1	8	2.2	5	1.8
The State Fair	7	1.9	5	1.9	8	2.1	6	1.8
Ski shows	4	1.6	4	1.7	6	1.7	2	1.4
Very useful in helping to gather travel information								
Consumer shows	14	2.5	12	2.5	[16]	2.6	12	2.2
Sports shows	8	2.1	8	2.2	10	2.2	6	1.8
The State Fair	8	2.0	6	2.0	10	2.1	8	1.8
Ski shows	5	1.7	6	1.8	7	1.7	3	1.4

Summary

The findings of this chapter may be summarized as follows:

... The majority of Texans in key markets, particularly families, begin their vacations in spring and summer.

... Texans have a relatively short planning horizon for making travel planning decisions. The majority of vacationers made the final decision about where to go during the three months prior to leaving and nearly as many only began to think about where they would go during the three months prior to leaving on their vacation. Communications to facilitate planning will therefore be most effective in late spring and early summer.

... Lodging and dining information is the type of information that the largest percent of Texans say they need to meet their travel planning requirements. About one-quarter want maps, information about routes, places to visit and things to do to plan their vacations.

... Half of all Texas residents use travel organizations of some sort, primarily travel agents to gather information. A sizable minority use various types of literature, primarily from government tourism departments, while many confer with friends and family.

... Reader's Digest and National Geographic seem to be the strongest vehicles (of those asked about) to reach this market.

... The only two newspapers which have substantial readership are the Houston Chonicle-Post and the Dallas Morning News.

... Half of the Texas market have ever attended The Texas State Fair or a sports of outdoor activity show. Many fewer have attended a consumer show or ski show.

... Very few Texans consider any of these various shows useful for learning about travel destinations, making travel plans or gathering travel information.

APPENDIX

Other References

Tourism Research

Couturier, H., Mills, A.S., Snepenger, D. "Segmenting Texas Snow Skiers. "Journal of Travel Research. 25:2, Fall 1986.

Research and Planning Division, Texas Department of Commerce. 1988 Economic Impact Analysis of Motorcoach Tourism Going to Texas. April 1989.

Research and Planning Division, Texas Department of Commerce. 1988 Economic Impact of Travel on Texas Counties. February 1990.

Research and Planning Division, Texas Department of Commerce. 1988 Texas City Room Occupancy Tax Survey. June 1989.

Research and Planning Division, Texas Department of Commerce. 1988 Texas Hotel Performance Report.

Research and Planning Division, Texas Department of Commerce. 1988 Texas Inquiry Conversion Study: Examining the Summer Traveler. January 1989.

Research and Planning Division, Texas Department of Commerce. 1989 Texas Travel Inquiry Conversion Study: The Winter Months. September 1989.

Research and Planning Division, Texas Department of Commerce. 1989 Winter Texan Market Report. March 1989.

Research and Planning Division, Texas Department of Commerce. Interviews with Motorcoach Tour Operators; June 1989.

Research and Planning Division, Texas Department of Commerce. Interviews with Travel Agents; November 1988.

Population Research

Research and Planning Division, Texas Department of Commerce. Estimates of the Total Population of Counties in Texas by Age, Sex and Race/Ethnicity for July 1, 1988. November 1989.

Research and Planning Division, Texas Department of Commerce. Net Migration in Texas: 1970 - 1980 by Age and Sex for Whites and Non-Whites, State and Counties. March 1985.

Research and Planning Division, Texas Department of Commerce. Population Estimation Techniques: A Guidebook. September 1983.

Research and Planning Division, Texas Department of Commerce. Population Projections: A Review of Basic Principles, Practices, and Methods. April 1987.

Research and Planning Division, Texas Department of Commerce. The Population of Texas: An Overview of Texas Population Change, 1970 - 1980. October 1985.

Research and Planning Division, Texas Department of Commerce. A Primer on Basic Demographic Methods for Small Area Analysis. December 1987.

Research and Planning Division, Texas Department of Commerce. Projections of the Population of Texas and Counties in Texas by Age, Sex, and Race/Ethnicity for 1990 - 2025. December 1988.

Research and Planning Division, Texas Department of Commerce. Update 1987 - The Continued Slowdown in Texas Population Growth: 1980 - 1985 Population Change in Texas Counties. January 1987.

Standard Rate & Data Service. The Lifestyle Market Analyst. 1989.

Business Climate Research

Research and Planning Division, Texas Department of Commerce. Foreign Direct Investment in the United States and Texas. May 1989.

Research and Planning Division, Texas Department of Commerce. Computerized "Texas Facts". October 1989.

Research and Planning Division, Texas Department of Commerce. MSA Reports. August 1989.

Research and Planning Division, Texas Department of Commerce. A Look at Texas: Mexico; A Look at Texas: Korea; A Look at Texas: France. Spring 1990.

Explanation of Balancing Plan

(A) Number of completed questionnaires
(B) Number of quota filled/terminates
(C) Total number of sample for the cell
(D) Percent of the total sample the cell represents
(E) Weighted number of respondents in the cell
(F) Actual weight to be applied to the data

ALBERTA TOURISM BALANCING PLAN

MARKET SEGMENTS

REGIONS	YOUNG SINGLES COUPLES		FAMILIES	EMPTY NESTERS	UNDER $25,000	TOTAL
WEST TEXAS	116	(A)	136	129	80	461
	8	(B)	87	28	149	272
	124	(C)	223	157	229	733
	0.1692	(D)	0.3042	0.2142	0.3124	1.0000
	79.0726	(E)	142.2032	100.1162	146.0293	467.4213
	0.6817	(F)	1.0456	0.7761	1.8254	1.0139
NORTHERN TEXAS	95		143	148	80	466
	7		84	37	157	285
	102		227	185	237	751
	0.1358		0.3023	0.2463	0.3156	1.0000
	58.3474		129.8515	105.8261	135.5719	429.5969
	0.6142		0.9081	0.7150	1.6946	0.9219
SOUTHEAST TEXAS	97		148	135	82	462
	7		87	18	156	268
	104		235	153	238	730
	0.1425		0.3219	0.2096	0.3260	1.0000
	110.1927		248.9930	162.1104	252.1717	773.4677
	1.1360		1.6824	1.2008	3.0753	1.6742
DALLAS FT. WORTH	114		142	124	80	460
	2		1	3	73	79
	116		143	127	153	539
	0.2152		0.2653	0.2356	0.2839	1.0000
	197.4027		243.3499	216.1219	260.3674	917.2419
	1.7316		1.7137	1.7429	3.2546	1.9940
AUSTIN SAN ANTONIO	146		137	97	83	463
	16		122	35	163	336
	162		259	132	246	799
	0.2028		0.3242	0.1652	0.3079	1.0000
	89.4953		143.0820	72.9221	135.9003	441.3998
	0.6130		1.0444	0.7518	1.6374	0.9533
HOUSTON	135		141	106	80	462
	12		87	25	142	266
	147		228	131	222	728
	0.2019		0.3132	0.1799	0.3049	1.0000
	196.0416		304.0644	174.7037	296.0628	970.8724
	1.4522		2.1565	1.6481	3.7008	2.1015
TOTAL REGIONS	703		847	739	485	2774
	52		468	146	840	1506
	755		1315	885	1325	4280
	1.0673		1.8311	1.2509	1.8507	6.0000
	730.5523		1211.3441	831.8004	1226.1032	4000.0000
	6.2286		8.5507	6.8348	15.1880	8.6588

SAMPLE DISPOSITION BY REGION

	REGION 1 (West)	REGION 2 (North)	REGION 3 (SE)	REGION 4 (Dallas)	REGION 5 (Austin)	REGION 6 (Houston)
Completes	461	466	462	460	463	462
Long	381	386	380	380	380	382
Short	80	80	82	80	83	80
Incompletes	29	30	26	29	35	38
Refusals	774	943	887	716	1,096	1,089
Terminates	272	285	268	79	336	266
Disconnect	1,778	1,619	1,168	998	1,104	1,596
Busy/no answer	3,781	5,158	4,849	2,165	4,734	4,035
Call back/ answering machine	1,245	1,040	1,166	968	1,889	1,784
Business	382	412	466	365	459	485
Deaf/language	124	52	131	16	70	61
Refusal Rate	50%	55%	54%	56%	57%	59%

[illegible], Inc.
13 Brickyard Court/P.O. Box 350
York, Maine 03909

(1-4)
5 - 1

#223-02-90 Sample # 1 2 3 4 5 6 (6

TEXAS MARKET POTENTIAL STUDY.

Hello. I'm _____ with Davidson-Peterson Associates, a national marketing research firm. We are conducting a survey among Texans about their attitudes toward travel and I'd like to ask you a few questions.

A. May I speak to the person in your household who is more than 18 years of age and whose birthday comes next? Would that be you?

YES ( )-1 — (SKIP TO Q.1) NO ( )-2

B. May I speak with that person?

YES ( )-1 — (REINTRODUCE YOURSELF AND SKIP TO Q.1)
NO ( )-2

C. To whom should I speak and what is his/her relationship to you?

NAME:_____ RELATIONSHIP:_____

IF SPOUSE OR SIGNIFICANT OTHER, COMPLETE INTERVIEW WITH PERSON WHO ANSWERED THE TELEPHONE.
IF ROOMMATE, SON/DAUGHTER, COUSIN, AUNT, UNCLE, BOARDER, ETC., MAKE AN APPOINTMENT FOR A CALLBACK.

1. Have you taken a vacation of at least two nights away from home in the past year?

YES ( )-1 NO ( )-2 (7

2. Do you plan to take a vacation of at least two nights away from home in the next year?

YES ( )-1 NO ( )-2 (8

3. Do you have any children under 18 years of age living at home?

YES(9) ( )-1 (QUALIFIES FOR QUOTA 2)—(SKIP TO Q. 5)
NO ( )-2

QUALIFIED/QUOTA 2 FILLED
1 2 3 4 5 6 7 8 9 (10

IF NO CHILDREN UNDER 18 AT HOME, ASK:

4. Are you under 45 years of age or 45 or older?

UNDER 45 (11) ( )-1 — (QUALIFIES FOR QUOTA 1)
45 OR OVER ( )-2 — (QUALIFIES FOR QUOTA 3)

QUALIFIED/QUOTA 1 FILLED
1 2 3 4 5 6 7 8 9 (12

QUALIFIED/QUOTA 3 FILLED
1 2 3 4 5 6 7 8 9 (13

5. Are you ... (READ OFF. STOP WHEN "YES" ANSWER IS RECEIVED.)

WORKING FULL TIME ( )-1 (14
A STUDENT ( )-2
RETIRED ( )-3
WORKING PART TIME ( )-4
UNEMPLOYED, OR ( )-5
A FULL TIME HOMEMAKER ( )-6
DO NOT READ: Other: _____( )-0

6. Is your total annual household income more than $25,000 or $25,000 or less?

MORE THAN $25,000 ( )-1 — (GO TO LONG FORM QUESTIONNAIRE) (15
$25,000 OR LESS ( )-2 — (CHECK QUOTA INSTRUCTIONS)

IF $25,000 OR LESS, CHECK Q. 5:

. IF STUDENT OR RETIRED, GO TO LONG FORM QUESTIONNAIRE.
. IF OTHER, CHECK SHORT FORM QUOTA 4.
IF NOT NEEDED, TERMINATE AND RECORD HERE:
OTHERWISE, GO TO SHORT FORM QUESTIONNAIRE.

QUALIFIED/QUOTA 4 FILLED
1 2 3 4 5 6 7 8 9 (16

QUOTA 1 2 3 4 (17

7. Now, I'm going to describe four different types of vacation trips that people take. I would like you to think about the last 12 months — from September of 1989 through August of 1990 — and tell me for each one, how many trips of that type you have taken. First... (READ OFF).

	# OF TRIPS	
The final destination was at least 1000 miles away from home. You flew and spent two or more nights outside Texas.	#_____	(18)
The trip included five nights or more away from home, of which at least three nights were outside Texas and you drove.	#_____	(19)
The trip was taken within Texas during which you spent two nights or more away from home. This category includes both flying and driving trips.	#_____	(20)
Finally, how many other trips of at least 1000 miles away from home have you taken outside of Texas where you have combined both business and pleasure in the past year?	#_____	(21)
TOTAL:	#_____	(22/23)

IF NO TRIPS AT ALL, SKIP TO Q. 12
IF ANY TRIPS, CONTINUE WITH Q. 8A

VACATION PATTERN:

8a. I would like to ask you a few questions about the primary or main vacation trip you took in the past 12 months. In which month did you begin your primary vacation? (VERIFY YEAR)

MONTH: 01 02 03 04 05 06 07 08 09 10 11 12 (24/25)

YEAR: _____ (MUST BE 9/89 OR LATER) (26)

8b. In what month (and year) did you finally decide upon your destination?

MONTH: 01 02 03 04 05 06 07 08 09 10 11 12 (27/28)

YEAR: _____ (MUST BE SAME OR EARLIER THAN Q. 8a) (29)

8c. In what month (and year) did you begin to think about where you would go?

MONTH: 01 02 03 04 05 06 07 08 09 10 11 12 (30/31)

YEAR: _____ (MUST BE SAME OR EARLIER THAN Q. 8b) (32)

9a. On this trip, how many nights, in total, did you spend away from home? # _____ (33/34)

9b. How many of these ____(# NIGHTS IN Q. 9a), if any, did you spend outside of Texas? # _____ (35/36)

NONE ( )-0 (GO TO Q. 9d)

IF ANY NIGHTS OUTSIDE TEXAS, ASK:

9c. Thinking still of the same trip, what was your main destination? (CHECK ONE) (DO NOT READ).

ALASKA (37)	( )-1	KANSAS (38)	( )-1	NEVADA (39)	( )-1
ARIZONA	( )-2	LOUISIANA	( )-2	OKLAHOMA	( )-2
ARKANSAS	( )-3	MISSOURI	( )-3	OREGON	( )-3
CALIFORNIA	( )-4	MONTANA	( )-4	WASHINGTON	( )-4
COLORADO	( )-5	NEW MEXICO	( )-5		
FLORIDA	( )-6				
CANADA(nfl) (40)	( )-1	ALBERTA	( )-4	BRITISH COLUMBIA	( )-6
MEXICO	( )-2	CENTRAL/SOUTH AMERICA	( )-5	CARIBBEAN	( )-7
OVERSEAS	( )-3			OTHER CANADA	( )-8

OTHER _____ ( )-0

9d. What two activities or experiences were you specifically seeking on this particular trip? (BE SPECIFIC)

_____ (41)

_____ (42)

9e. Was the primary purpose of this trip ... (READ OFF)

BUSINESS	( )-1	(43)
VACATION	( )-2	
A VISIT TO FRIENDS OR RELATIVES	( )-3	
A CONVENTION, MEETING OR CONFERENCE	( )-4	
OTHER: _____	( )-0	

9f. What features of this vacation make you consider it as your primary or main vacation?

_____ (44)

_____ (45)

VACATION PLANNING:

10. Vacationers choose a holiday destination for a variety of reasons. I'm going to read you some reasons others have mentioned and I'd like to know how important each one is to you. Using a scale from one to five where one represents not at all important and five represents very important, please give me the number which best expresses how important each item was to your decision about where to go for your last primary vacation. (BEGIN WITH CHECKED ITEM) First...

( ) NATURAL BEAUTY	____	(46)
SENSE OF HISTORY	____	(47)
ADVENTURE ACTIVITIES SUCH AS RIVER RAFTING, TRAIL RIDING, FLY-IN FISHING, MOUNTAIN CLIMBING	____	(48)
HIGH QUALITY OR LUXURY ACCOMMODATIONS	____	(49)
SENSE OF WILDERNESS	____	(50)
SOMETHING NEW AND DIFFERENT	____	(51)
OUTDOOR ACTIVITIES SUCH AS CAMPING, HIKING, ETC.	____	(52)
A PLACE TO RELAX	____	(53)
FULLY SERVICED CAMPGROUNDS	____	(54)
DISTANCE TO YOUR DESTINATION	____	(55)
VALUE FOR YOUR DOLLAR SPENT	____	(56)
HAVING LOTS OF THINGS TO DO	____	(57)
SHOPPING	____	(58)
DOWNHILL SKIING	____	(59)
MOUNTAIN SCENERY	____	(60)
WATER EXPERIENCES SUCH AS SWIMMING, SUNBATHING, BOATING	____	(61)
( ) BUDGET ACCOMMODATIONS	____	(62)

11. I'm going to read you a list of activities. For each one, please tell me whether or not you participated in that activity on your last primary trip.

	YES	NO	
VISIT FRIENDS/RELATIVES	( )-1	( )	(64)
ATTEND SMALL TOWN FESTIVALS, FAIRS,OR EVENTS	( )-2	( )	
SHOPPING	( )-3	( )	
SIGHTSEEING	( )-4	( )	
ATTEND CULTURAL EVENTS (PLAYS, CONCERTS)	( )-5	( )	
NIGHTLIFE/RECREATIONAL ACTIVITIES	( )-6	( )	
VISIT A ZOO/MUSEUM/NATURAL DISPLAY	( )-7	( )	
VISIT A NATIONAL PARK/STATE OR PROVINCIAL PARK/ HISTORIC SITE	( )-8	( )	
ATTEND A SPORTS EVENT	( )-9	( )	
SHORT GUIDED EXCURSIONS/TOURS	( )-0	( )	
ANY WATER SPORTS	( )-1	( )	(65)
DOWNHILL SKIING	( )-2	( )	
GOLF	( )-3	( )	
HIKING	( )-4	( )	
TRAIL RIDING	( )-5	( )	
WHITEWATER RAFTING	( )-6	( )	
FLY-IN FISHING	( )-7	( )	
FISHING OR HUNTING	( )-8	( )	
OTHER ADVENTUROUS ACTIVITIES	( )-9	( )	

INFORMATIONAL NEEDS:

12. What type of trip information do you usually need to meet your travel planning requirements? (DO NOT READ. RECORD ANSWERS BELOW)

HOTELS/MOTELS	( )-1	(66)
RESTAURANTS	( )-2	
CAMPGROUNDS	( )-3	
RV FACILITIES	( )-4	
MAPS/ROUTES	( )-5	
GOLF COURSES	( )-6	
PLACES TO VISIT/THINGS TO SEE AND DO	( )-7	
OTHER PLACES TO GET INFORMATION	( )-8	
TRANSPORTATION INFORMATION	( )-9	
CITY INFORMATION/CITIES	( )-0	
FISHING	( )-1	(67)
SKIING	( )-2	
WEATHER	( )-3	
OTHER	( )-4	

13. Where do you usually get any travel information you need when you're planning a trip? (PROBE. DO NOT READ. CHECK ALL MENTIONS)

FOR EACH MENTIONED, ASK:

14. Did you _____(CATEGORY CHECKED IN Q. 13) for your most recent primary vacation trip?

		Q. 13 USE		Q. 14 YES	Q. 14 NO
CONTACT A TOUR OPERATOR OR ORGANIZER	(68)	( )-1	(70)	( )-1	( )
USE A MOTOR COACH OR BUS TOUR OPERATOR		( )-2		( )-2	( )
GO TO AN AUTOMOBILE CLUB		( )-3		( )-3	( )
GO TO A TRAVEL CLUB		( )-4		( )-4	( )
TALK TO A TRAVEL AGENT		( )-5		( )-5	( )
CALL A 1-800 NUMBER		( )-6		( )-6	( )
MAIL IN POP-UP CARDS FROM A MAGAZINE		( )-7		( )-7	( )
MAIL IN CLIP-OUT COUPONS FROM A MAGAZINE		( )-8		( )-8	( )
TALK TO FRIEND OR FAMILY		( )-9		( )-9	( )
CONTACT A GOVERNMENT TOURISM DEPARTMENT FOR LITERATURE	(69)	( )-0	(71)	( )-0	( )
GO TO THE LIBRARY		( )-1		( )-1	( )
USE HOTEL/RESORT/AIRLINE/TOUR OPERATOR BROCHURES		( )-2		( )-2	( )
NONE		( )-3		( )-3	( )
DON'T KNOW		( )-9		( )-9	( )
OTHER (PLEASE SPECIFY) _____		( )-0		( )-0	( )

15. Are you a member of AAA Texas or another automobile club?

YES, AAA TEXAS ( )-1 YES, OTHER ( )-2 NO ( )-3 (72)

16. Have you ever attended...(READ OFF AND RECORD BELOW)

FOR EACH MENTIONED, ASK:

17. How often in the past three years have you attended _____(TYPE OF SHOW)?

		Q. 16 EVER VISITED YES	Q. 16 EVER VISITED NO	Q. 17 VISITS PAST 3 YEARS	
A CONSUMER SHOW WHICH INCLUDED TRAVEL INFORMATION	(73)	( )-1	( )	# _____	(74)
A SPORTS OR OUTDOOR ACTIVITY SHOW		( )-2	( )	#_____	(75)
THE TEXAS STATE FAIR		( )-3	( )	#_____	(76)
A SKI SHOW		( )-4	( )	#_____	(77)

73-80 RE

18. Using a scale from one to five where one means "not at all useful" and five means "very useful", how useful do you consider ... (READ FIRST CATEGORY BELOW. CONTINUE WITH FIRST COLUMN. RECORD RESPONSE ON CORRECT LINE BELOW. ASK A, B & C FOR EACH ITEM BEFORE PROCEEDING TO NEXT ITEM.

	a. "In increasing your awareness of travel destinations?"	b. "In helping to make travel plans?"	c. "In helping to gather travel information?"
CONSUMER SHOWS:	_____ (6)	_____ (10)	_____ (14)
SPORTS SHOWS:	_____ (7)	_____ (11)	_____ (15)
THE STATE FAIR:	_____ (8)	_____ (12)	_____ (16)
SKI SHOWS:	_____ (9)	_____ (13)	_____ (17)

MEDIA

19a. Do you subscribe to or frequently buy ... (READ OFF. RECORD IN FIRST COLUMN BELOW)

FOR EACH "YES," ASK:

19b. On a scale of one to five where one represents "not at all thoroughly" and five represents "very thoroughly", in general, how thoroughly do you read... (READ FIRST "YES" MAGAZINE. RECORD IN SECOND COLUMN BELOW.)

	Q. 19a YES	NO	Q. 19b THOROUGHNESS	
ENDLESS VACATION	(18) ( )-1	( )	_____	(19)
MODERN MATURITY	( )-2	( )	_____	(20)
NATIONAL GEOGRAPHIC	( )-3	( )	_____	(21)
PEOPLE MAGAZINE	( )-4	( )	_____	(22)
READER'S DIGEST	( )-5	( )	_____	(23)
SUNSET MAGAZINE	( )-6	( )	_____	(24)
TIME MAGAZINE	( )-7	( )	_____	(25)
TRAVEL AND LEISURE	( )-8	( )	_____	(26)

19c. What newspapers do you subscribe to or read frequently?

AUSTIN AMERICAN STATESMAN (27)	( )-1	EL PASO HERALD POST (28)	( )-1
BEAUMONT ENTERPRISE	( )-2	FORT WORTH STAR-TELEGRAM	( )-2
CORPUS CHRISTI CALLER	( )-3	HOUSTON CHRONICLE-POST	( )-3
CORPUS CHRISTI TIMES	( )-4	LUBBOCK AVALANCHE JOURNAL	( )-4
CORPUS CHRISTI CALLER-TIMES	( )-5	SAN ANTONIO EXPRESS NEWS	( )-5
DALLAS NEWS	( )-6	SAN ANTONIO LIGHT	( )-6
DALLAS WALL STREET JOURNAL	( )-7	OTHER: (PLEASE SPECIFY)_____	( )-0
DALLAS TIMES HERALD	( )-8		
EL PASO TIMES	( )-9		

ALBERTA VACATION

20. I'm going to read you the names of some places you might visit on vacation. Have you heard of _____ as a place for a vacation trip? (READ OFF/RECORD BELOW)

IF ANY "YES" IN Q. 20 EXCEPT "*" ITEM, ASK:

21. You mentioned you've heard of Alberta or some places in Alberta as a place to visit for a vacation trip. Where is Alberta located?

(DO NOT READ LIST. DO NOT PROBE. CHECK ALL THAT APPLY)

NORTH OF MONTANA	( )-1	(29)
EAST OF BRITISH COLUMBIA	( )-2	
WEST OF SASKATCHEWAN	( )-3	
BETWEEN B.C. AND SASKATCHEWAN	( )-4	
IN THE PRAIRIES	( )-5	
IN THE CANADIAN ROCKIES	( )-6	
NORTH	( )-7	
WESTERN CANADA	( )-8	
IN THE WEST	( )-9	
IN CANADA	( )-1	(30)
OTHER: (PLEASE SPECIFY): _____	( )-0	
DON'T KNOW	( )-9	

22. Have you ever visited _____ (EACH "YES" ANSWER IN Q.20 EXCEPT "*" ITEM) on a vacation trip? (RECORD BELOW)

FOR EACH "YES" IN Q. 22 ASK:

23. Did you visit _____ in the past 12 months? (RECORD BELOW)

	Q.20 Heard Of YES	Q.20 Heard Of NO	Q.22 Ever Visited YES	Q.22 Ever Visited NO	Q.23 Visited Past 12 Months YES	Q.23 Visited Past 12 Months NO
ALBERTA	(31)( )-1	( )	(32) ( )-1	( )	(33)( )-1	( )
BANFF	( )-2	( )	( )-2	( )	( )-2	( )
CALGARY	( )-3	( )	( )-3	( )	( )-3	( )
CANADIAN ROCKIES	( )-4	( )	( )-4	( )	( )-4	( )
EDMONTON	( )-5	( )	( )-5	( )	( )-5	( )
JASPER	( )-6	( )	( )-6	( )	( )-6	( )
LAKE LOUISE	( )-7	( )	( )-7	( )	( )-7	( )
* BRITISH COLUMBIA	* ( )-8	( )	— IF "YES" ONLY IN BRITISH COLUMBIA, SKIP TO Q. 28			
NONE OF ABOVE		( )	— SKIP TO Q. 28			

IF ALBERTA OR PLACES IN ALBERTA MENTIONED IN Q. 22 (ANY "YES" IN Q. 22)
ASK Q. 24 - 27.
OTHERS SKIP TO Q. 28.

IF ANY PLACES CHECKED IN Q. 22 AND NOT IN Q. 23, ASK:

24. In what year did you last visit Alberta? 19 _____ (34/35)

25. Thinking of your last Alberta trip, which one of the following trip types best describes the kind of trip you took? Was it... (READ OFF AND RECORD BELOW. BEGIN IN WITH CHECKED ITEM.)

( )	AN OUTDOOR VACATION	( )-1	(36)
	A RESORT VACATION	( )-2	
	A TOURING VACATION	( )-3	
	A TOWN OR CITY TRIP	( )-4	
	A VISIT TO FRIENDS OR RELATIVES	( )-5	
	A BUSINESS OR CONVENTION TRIP	( )-6*	
	A COMBINED BUSINESS AND PLEASURE TRIP	( )-7*	
	A GOLFING HOLIDAY	( )-8	
( )	A SKIING HOLIDAY	( )-9	

IF "*" ITEMS IN Q. 25 NOT MENTIONED, ASK:

26. Have you ever visited Alberta on a business trip?

YES ( )-1 NO ( )-2 (37)

IF "YES," ASK:

27. In what year did your last business trip to Alberta take place? 19____ (38/39)

28. Which of the following statements best describes your likelihood of traveling to Alberta in the next 12 months? (READ OFF)

I'VE ALREADY COMPLETED PLANNING FOR AN ALBERTA TRIP	( )-1 — CONTINUE	(40)
I'M DEFINITELY PLANNING ON IT	( )-2 — CONTINUE	
I'M CONSIDERING A TRIP TO ALBERTA	( )-3 — GO TO Q. 36	
I'M NOT PRESENTLY CONSIDERING, BUT WOULD CONSIDER	( )-4 — GO TO Q. 36	
I WOULDN'T CONSIDER IT	( )-5 — GO TO Q. 38	
DON'T KNOW	( )-6 — GO TO Q. 38	
NOT SURE	( )-9 — GO TO Q. 38	

IF PLANNING AN ALBERTA TRIP, ASK:

29. What is the main purpose of this trip you are planning to Alberta?

AN OUTDOOR VACATION	( )-1	(41)
A RESORT VACATION	( )-2	
A TOURING VACATION	( )-3	
A TOWN OR CITY TRIP	( )-4	
A VISIT TO FRIENDS OR RELATIVES	( )-5	
A BUSINESS OR CONVENTION TRIP	( )-6	
A COMBINED BUSINESS AND PLEASURE TRIP	( )-7	
A GOLFING HOLIDAY	( )-8	
A SKIING HOLIDAY	( )-9	

30. How many days will the complete trip take? #_____ (42/43)

31. How many days do you think you will spend in Alberta? #_____ (44/45)

32. How many members of your household, including yourself, will be included on this trip? #_____ (46)

33. What method of transportation best describes what you are planning to use for this vacation?

MY OWN CAR	(47)( )-1	
MY OWN CAMPER/RECREATION VEHICLE	( )-2	
AIRPLANE	( )-3-WILL YOU RENT A CAR? YES( )-1 NO( )-2	(48)
OTHER	( )-5	
NOT STATED	( )-6	

34. What one type of accommodations will you mainly use while you are in Alberta? (CHECK ONE)

HOTEL	( )-1	(49)
MOTEL	( )-2	— ASK Q. 35
RESORT	( )-3	
CAMPING/CAMPER	( )-4	
R.V./RECREATIONAL VEHICLE	( )-5	
FRIENDS/RELATIVES	( )-6	— SKIP TO Q. 36
OTHER	( )-7	
NOT STATED	( )-8	

IF HOTEL/MOTEL/RESORT MENTIONED, ASK:

35. Would you categorize your hotel accommodations as luxury or 4-Star or as budget?

LUXURY/4-STAR	( )-1	(50)
BUDGET	( )-2	
NOT STATED	( )-3	

36. Will your Alberta vacation likely occur in...

SPRING ( )-1 FALL ( )-3 (51)
SUMMER ( )-2 WINTER ( )-4

37. If you were planning a trip to Alberta, Canada, how would you collect the information you needed? (DO NOT READ)

	FIRST MENTION		SECOND MENTION	
GO TO AN AUTOMOBILE CLUB	(52)	( )-1	(54)	( )-1
GO TO A TRAVEL CLUB		( )-2		( )-2
TALK TO A TRAVEL AGENT		( )-3		( )-3
CALL A 1-800 NUMBER		( )-4		( )-4
MAIL IN A CARD FROM A MAGAZINE		( )-5		( )-5
MAIL IN COUPONS FROM A MAGAZINE		( )-6		( )-6
WRITE A LETTER		( )-7		( )-7
CIRCLE A NUMBER OF A READER'S CARD FROM A MAGAZINE	(53)	( )-1	(55)	( )-1
TALK TO FRIENDS OR FAMILY		( )-2		( )-2
CONTACT TRAVEL ALBERTA/ALBERTA TOURISM		( )-3		( )-3
GO TO THE LIBRARY		( )-4		( )-4
OTHER (PLEASE SPECIFY) _____		( )-0		( )-0
DON'T KNOW		( )-9		( )-9

38. Have you heard the following theme slogans or phrases before?

	YES	NO	NOT SURE	
ALBERTA IN ALL HER MAJESTY	( )-1	( )-2	( )-3	(56)
ALBERTA, LAND OF LEGENDS	( )-1	( )-2	( )-3	(57)
SKI ALBERTA	( )-1	( )-2	( )-3	(58)
TAKE AN ALBERTA BREAK	( )-1	( )-2	( )-3	(59)
SUPERNATURAL BRITISH COLUMBIA	( )-1	( )-2	( )-3	(60)
YUKON... THE MAGIC AND THE MYSTERY	( )-1	( )-2	( )-3	(61)

BACKGROUND INFORMATION

The last few questions are being asked so we may classify the information from this study. All your answers will be kept strictly confidential.

A. What is the highest level of education you have completed?

LESS THAN HIGH SCHOOL	( )-1	(
COMPLETED HIGH SCHOOL	( )-2	
JUNIOR/COMMUNITY COLLEGE TECHNICAL/VOCATIONAL SCHOOL	( )-3	
SOME UNIVERSITY/COLLEGE	( )-4	
COMPLETED UNIVERSITY/COLLEGE	( )-5	
POSTGRADUATE	( )-6	
REFUSED	( )-7	

B. What is your age, please? #_____ (63/

C. Including yourself, how many people are there in your household? #_____ (
(IF "ONE", SKIP TO Q.I)

IF MORE THAN ONE PERSON IN THE HOUSEHOLD, ASK:

D. How many are... (READ OFF)

CHILDREN UNDER 6 YEARS	#_____		(
CHILDREN 6-12 YEARS	#_____		(
TEENAGERS 13-17 YEARS	#_____		(
18 YEARS AND OVER, INCLUDING YOURSELF	#_____	(IF ONE, SKIP TO Q.I)	(
NOT STATED	( )-0		

IF MORE THAN ONE ADULT IN HOUSEHOLD, ASK:

E. How many wage earners are there in your household?

ONE	( )-1	ASK Q. F
TWO	( )-2	
THREE OR MORE	( )-3	
NONE	( )-4	SKIP TO Q.I
REFUSED	( )-5	

IF MORE THAN ONE WAGE EARNER, ASK:

F. Are you the chief wage earner? The chief wage earner is that person in your household with the highest income.

YES, RESPONDENT IS	( )-1	— SKIP TO Q. I
NO, SOMEONE ELSE IS	( )-2	— ASK Q. G
REFUSED	( )-3	— SKIP TO Q. I

IF RESPONDENT IS NOT CHIEF WAGE EARNER, ASK:

G. Is the age of the chief wage earner: (READ OFF)

UNDER 45	( )-1	(7
45 OR OLDER	( )-2	
NOT STATED	( )-9	

H. What is the highest level of education the chief wage earner has completed?

LESS THAN HIGH SCHOOL	( )-1	(7
COMPLETED HIGH SCHOOL	( )-2	
JUNIOR/COMMUNITY COLLEGE/ TECHNICAL/VOCATIONAL SCHOOL	( )-3	
SOME UNIVERSITY/COLLEGE	( )-4	
COMPLETED UNIVERSITY/COLLEGE	( )-5	
POSTGRADUATE	( )-6	
REFUSED	( )-7	

5-3

ASK EVERYONE

I. In at least two words, please describe the occupation of the chief wage earner? (IF RESPONDENT SAYS THERE IS NO CHIEF WAGE EARNER, ASK FOR RESPONDENT'S OCCUPATION.)

_____
_____
_____

6-
7-

J. Which of the following categories best describes your race or ethnic background?

ASIAN OR PACIFIC ISLANDER	( )-1	(8)
BLACK OR AFRICAN AMERICAN	( )-2	
CAUCASIAN OR WHITE	( )-3	
HISPANIC OR CENTRAL AMERICAN	( )-4	
NATIVE AMERICAN	( )-5	
OTHER _____	( )-0	
NOT STATED	( )-9	

K. I also have some income categories. Please stop me at the appropriate place. Was your total annual household income before taxes in 1989...

Under $10,000	( )-1	(9)
$10,000 - $20,000	( )-2	
$20,000 - $25,000	( )-3	
$25,000 - $30,000	( )-4	
$30,000 - $40,000	( )-5	
$40,000 - $50,000	( )-6	
$50,000 - $60,000	( )-7	
$60,000 - $70,000	( )-8	
$70,000 - $80,000	( )-9	
$80,000 - $90,000	( )-1	(10)
$90,000 OR MORE	( )-2	
DON'T KNOW/REFUSED	( )-9	

L. DO NOT READ — RECORD SEX OF RESPONDENT

FEMALE ( )-1 MALE ( )-2 (11)

M. RECORD ZIP CODE: _ _ _ _ _ (12-16)

THANK YOU VERY MUCH FOR YOUR HELP AND INFORMATION!

17-
18-
19-
20-
21-